SIS User Manual

Screening Information System
Version 2.1

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1.0 Overview

SIS User Manual Overview

What is SIS?

SIS is a fully integrated clinical screening system that supports California's Newborn and Prenatal Screening Programs. In 2005, SIS replaced the aging Data General systems to enable the Genetic Disease Screening Program (GDSP) to fully support the State's annual 525,000+ newborn and 360,000+ prenatal screening tests. The system allows users to capture, store, analyze, and review patient test samples and demographic data, and initiate and manage the subsequent processing, tracking, follow-up, billing, and reporting activities associated with case management. SIS is used by a wide variety of users including Newborn and Prenatal Screening (NAPS) Laboratories, Case Coordination Centers (CCCs), NT Practitioners, Confirmatory Laboratories, Prenatal Diagnostic Centers (PDCs), Sickle Cell Counseling Centers (SCCCs), Metabolic Centers (MCs), Cystic Fibrosis Centers (CFs) and GDSP users.

SIS uses hardware and software technology to provide substantial improvements over the Data General systems and to support GDSP's screening programs far into the future. The system was designed to provide a wide range of benefits, including the following:

- Improved user-friendliness.
- Increased scalability, which allows for functionality expansion when required and capability to support growth of the user population.
- Streamlined maintenance and operations activities.
- Enhanced reporting capabilities.
- Automated workflow.
- Increased access to case management data.
- Centralized information storage and access.
- Improved case and client matching.

What is the SIS User Manual?

The SIS User Manual was developed to serve as an online and desk reference guide, providing information about how to use each screen in SIS. The SIS User Manual contains detailed descriptions of all SIS screens that end-users have access to view, update, create or delete. Information from each screen is described using one or more screenshots, how to navigate to the screen, an overview of the screen and its purpose, and a description of the key functions.

SIS Basics

The SIS application is used to view, enter, update, and utilize prenatal and newborn screening information. SIS is a web-based application, allowing users to access the system from any computer with an Internet Explorer web browser (software that allows the user to view and interact with web pages). This section provides an overview of the Microsoft Internet Explorer browser, how to perform actions in SIS, and the primary components of SIS.

Actions in SIS

Most actions in SIS can be performed using both the mouse and keyboard. When both the keyboard and mouse work, the functionality will generally be the same regardless of which option you choose.

The **Tab** key will move the cursor from field to field as you enter data into SIS.

In SIS, the **Enter** key may perform different functions than in the system you used previously, Data General. Following are three functions of the **Enter** key in SIS.

- Hitting **Enter** will usually save information on the page you are currently viewing.
- On the Update Case screen, hitting **Enter** will invoke the Reinterpretation button. A reinterpretation of the patient's results will be generated. However, this information will not be saved until you select **Save**.
- If you've used your **Tab** key to tab onto one of the buttons on a page (SIS-specific buttons are described in further detail below) typing the **Enter** key will invoke the action of that button.

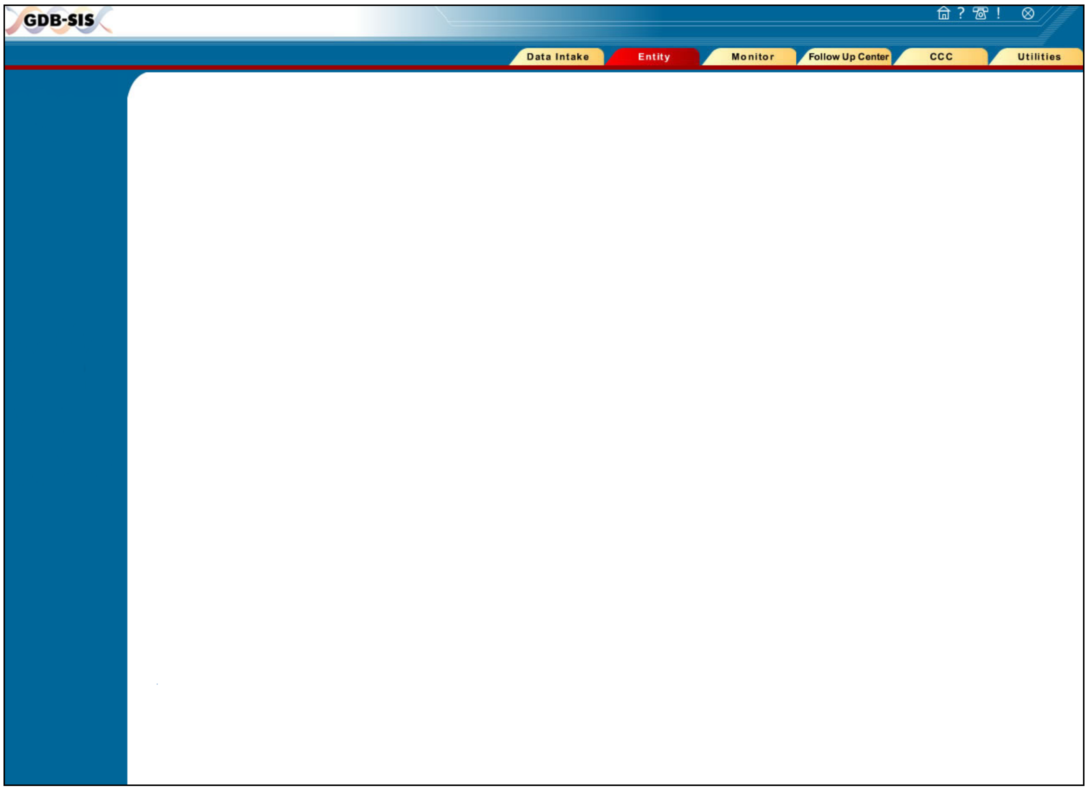
The **Up Arrow** and **Down Arrow** keys may be used to select data from a dropdown without using the mouse.

The step-by-step processes detailed in each lesson in this manual are written using the visual functionality of the SIS application, which relies on a mouse for some actions. The following terms are used for **mouse actions**, based on a mouse that is configured for the right hand.

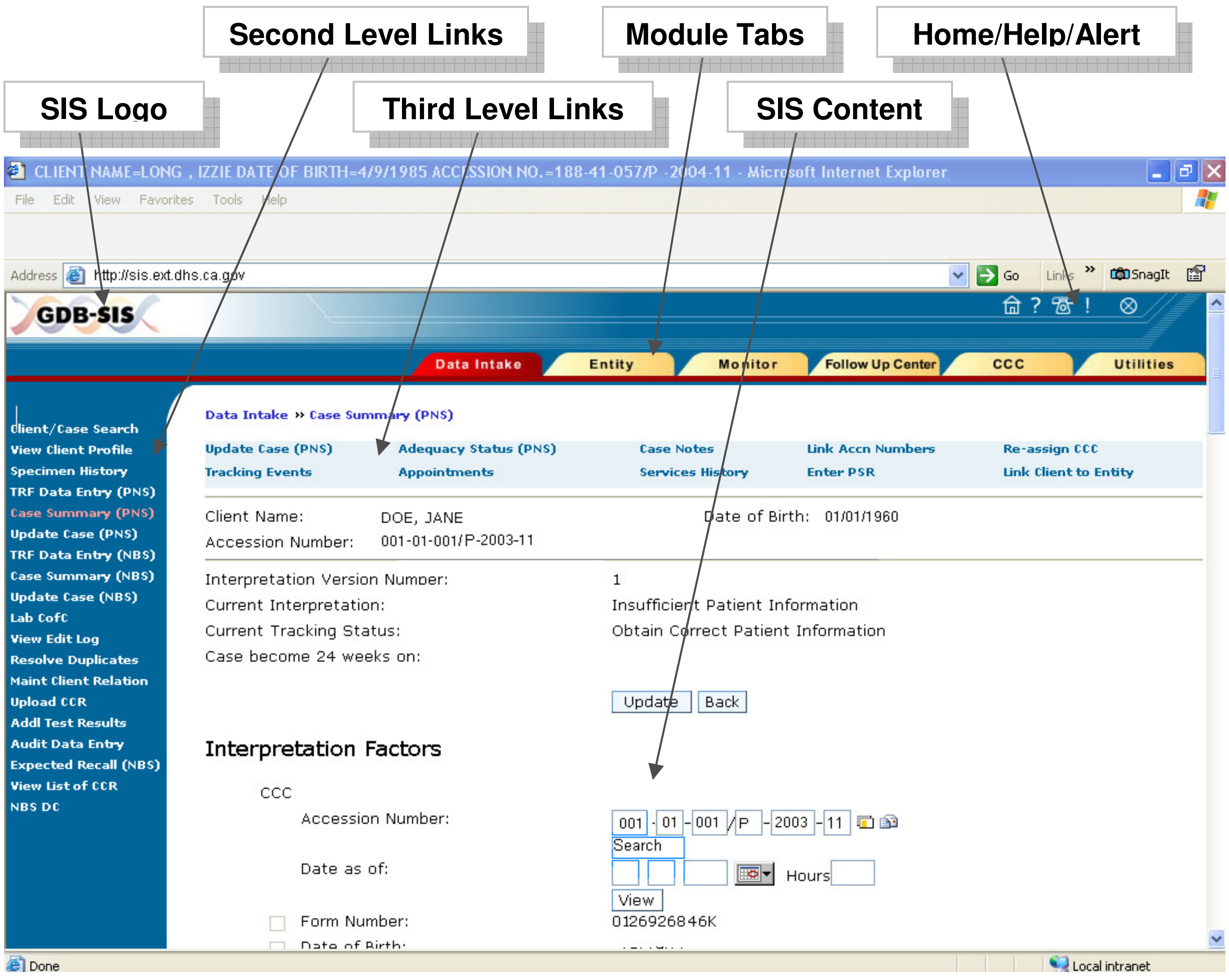
	Instruction	Description
1	Click	Press the left button on the mouse once.
2	Right-click	Press the right button on the mouse once.

Components of SIS

All SIS screens are composed of two primary areas: Navigation and Content. Navigation sections are used to locate specific functions or activities that you would like to perform. This includes tabs, icons, and links that, when clicked, load specific SIS screens. The Content section displays the information associated with the specific screen to which you navigated. This includes text, fields, buttons, and other controls used to perform actions in SIS. The Navigation and Content in SIS is separated in an upside down "L" layout. This layout will always be used so that all SIS screens have a uniform look and feel. In the figure below, which illustrates a SIS screen, the navigation is located in the gray upside down "L" while the content is located in the white square.



Within the Navigation and Content areas, SIS contains detailed screen layout components. These include module tabs, second and third level links, the SIS logo, home/help/alert navigation, and SIS content. The diagram below illustrates where each of these layout components are found in SIS.



Module Tabs (First Level Links)

Modules are groupings of screens that will help specific user groups accomplish their work. Your specific user group will determine what module tabs are available to you. For example, an individual working in a Case Coordination Center (CCC) will see modules such as Data Intake, Entity, Monitor, Follow-Up Center, CCC, and Utilities. These module tabs are the highest level of navigation available in SIS and sit across the top of the screen.

Second Level Links

Second level links are links to individual screens within a module that accomplish a specific task. Second level links sit along the left side of the screen. For example in the Data Intake Module, the user may want to view a client profile.

Third Level Links

Third level links are links to screens associated with the second level links of a module. In the previous example of viewing a client profile summary, the associated tasks you want to accomplish may include updating contact or case information or entering tracking events. Also, third level links may provide access to the same screens as second level links. Third level links sit under the module tabs on the screen.

Main Content of Page

The main content of the page is where you will view or enter data. Depending on your access rights, this may include viewing headline cases, updating case information, or maintaining a user account. The main page content sits in the center of the screen, below the third level links.

Home/Help/Contact/Alert/Sign Out

The Home/Help/Alert Navigation component of the screen will be the central location for individuals to navigate to the home page of SIS, receive help within the application, and view pertinent alerts directed to them. This component sits at the top right hand corner of the screen. The specific buttons and the associated functions are described below.

	Button	**Button Name**	**Description**
1		Home	Returns you to your default SIS homepage.
2		Help	Opens the SIS help screens. This should be used if you have questions or need assistance with SIS functionality.
3		Contact	Provides contact information for the SIS Help Desk
4		Alert	Loads the SIS Alerts screen. Alerts are notifications you may receive in SIS that require your attention and may prompt further action. Do not disregard an alert! This screen shows the various alerts for cases relevant to your user group and role in SIS.
5		Sign Out	Immediately terminates your session in SIS and logs you out of the application. Be sure to click the **Save** button before signing out to save your work. **On some screens, there is no warning about losing unsaved data**. To begin using SIS again, you must re-login to the system. It is important to sign-out when you are done using SIS so that unauthorized users will not gain access to the system.

SIS Elements

Fields

Fields are rectangular boxes on the screens in SIS that are used to enter text or information and display specific information. Most fields are labeled to indicate the type of information to be entered in the field, such as “Accession Number” or “Last Name”.

SIS fields also have various properties that influence how a user interacts with the field. The fields in SIS can have one (or more) of five common properties: modifiable, required, repeat entry, display-only, and grayed out.

	Field Type	Description
1	**Modifiable**	One of the most common field properties that allows users to enter or update information in the field. For example, in a modifiable field, users can click in the field and enter data, usually letters, numbers or characters. Generally, a modifiable field is a box with a white background.
	Example: First Name:	
2	**Required**	The information in these fields is required in order for a user to save a screen or perform an action. If you attempt to save a record without first entering data in the required fields, SIS will provide an error message to tell you which required fields you’ve missed. Required fields are indicated by a preceding asterisk (*) symbol.
	Example: * Transferase:	
3	**Repeat-Entry**	These fields contain data on which GDSP places emphasis by requiring the data entry user to enter the same information **twice** in the field. This repeat-entry is designed to prevent data entry errors. Repeat-Entry fields are indicated by a preceding pound/number (#) symbol.
	Example: #Date of Birth: - -	

	Field Type	Description
4	**Display-Only**	Contains data that cannot be updated on the screen where the information is displayed. In general, this information will be displayed as plain text, rather than inside a box or other field.

Example:

Client Name: DOE, JANE Date of Birth: 01/01/1960
Accession Number: 001-01-001/P-2003-11

5	**Grayed Out**	Contains data that cannot be entered or updated on the screen where the information is displayed. Grayed out data is displayed inside a box, similar to the modifiable field; however, you will not have access to modify grayed out fields.

Example:

Galactosemia

6	**Check box**	A checked box indicates "yes" or that the data applies. An unchecked box indicates that the data does not apply or has not yet been identified.

Example:

Race / Ethnicity: ☐ White

7	**Drop-down**	Lists the possible values for the field. You cannot type free form text into a drop-down field. Rather, you must click on the down arrow on the right side of the box to view the list of possible values. To get to a value quickly, type the first letter of the value; the drop-down field will take you directly to the values starting with that letter. Alternatively, you can scroll down to find the value you are looking for.

Example: *Gender: Select

8	**Radio button**	Indicates a choice. Radio buttons are usually used to display a group of options, when you can only choose one at a time.

	Field Type	Description

Example:

Select	Entity Type	Entity Name
◉	Case Coordination Center (CCC)	GENETIC DISEASE BRANCH - PNS
○	Government Agency	GDB

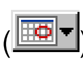
9	**Data Grid**	Used to display a grouping of related data in a table format in SIS. Similar to a table, a data grid has rows, columns, and column headers. Depending on the data grid's length, some may have scroll bars so that users can view additional information by scrolling up or down.

Example:

Accn Number	Last Name	First Name	DOB	Appt Date	Appt Time	Appt Status
001-01-001/P-2003-11	DOE	JANE	01-01-1960			No Show
001-01-001/P-2003-11	DOE	KAREN	01-01-1960			Not Scheduled

Data Types

Certain fields may require specific types of data, other than alpha characters, to be entered. The table below describes the most common data types in SIS.

	Data Type	Description
1	Numeric	May contain numbers only.
2	Date	May contain dates only. Often has a calendar icon () that can be used to quickly select a date.
3	Time	May contain times only. Times should always be recorded based on a 24-hour military clock. For example, 4:00pm should be entered as "1600".

SIS–Specific Actions

Buttons

Throughout SIS, buttons are used to perform certain actions, such as saving data or updating data. The table below lists the buttons that are displayed on screens in SIS that are common to all user groups. These buttons generally perform the same function on any screen where they are found. Buttons that relate to specific job functions or user groups are described in the subsequent chapters, where they will be used.

	Button Name	Description
1	Save	Saves data that you have entered into SIS.
2	Update	Takes you to an edit screen, to allow you to update data that was previously entered.
3	Back	Returns you to the previously displayed screen.
4	Sort	Sorts the displayed data based on your selected sort criteria.
5	Clear	Clears the data fields on the displayed screen.
6	Edit	Allows you to enter Edit mode on the same screen, in order to change data that was previously entered.
7	Search	Searches data in SIS for items matching your selected search criteria.

Accession Number Icons

On any screen where you can input an Accession Number, there are two icons located directly to the right of the field. These icons will make it very easy for you to copy an Accession Number onto another screen to search for that same client. You simply click on the copy icon: 

When you get to search screen, you click on the paste icon:  and the Accession Number you have copied will be displayed in the Accession Number field.

SIS Impact on Prenatal Screening (PNS)

The Expanded Alpha-Fetoprotein Program (XAFP) will be referred to as the Prenatal Screening (PNS) Program going forward. In most cases, wherever you would reference the XAFP program, GDSP will use the term PNS program throughout this User Manual, and as a business practice going forward.

In addition, with the SIS application there are a few instances in which PNS business practices will change. Following is a description of these changes.

New Forms

The following descriptions highlight important changes to the Test Request Form (TRF) and the Result mailer.

Test Request Form: TRFs will now be entered into SIS using Optical Character Recognition (OCR) technology. However, Newborn and Prenatal Screening Laboratories will have the ability to enter TRF data directly into SIS as well.

Result Mailers:

1. Result mailers have a new format.
2. For non-negative cases, users must actively generate a Result mailer for same-day processing, bypassing the automatic 3-day hold for non-negative mailers.

New Functions

SIS will also provide several additional functions for the PNS program. These include:

Tracking Events: Several new tracking events will be available to you in SIS.

Case Notes: You will have the ability to track notes about a case online using SIS. The notes will be stored in SIS and you will have access to refer to them anytime.

New Headline Cases: You will now receive a Headline Case in SIS for two additional types of cases:

1. Coordinator actions required on Screen Negative cases
    - These will include screen negative cases with twins or marked “Yes” for HX/RX.
2. Prompt for Coordinator to review the TRF image
    - SIS will allow the coordinators to view the scanned image of any TRF. However, the data entry clerks can also flag a TRF for coordinator review. Such a case will appear on the Headline Case screen with a checkmark in the “View Form” column. This is true even if the test results are screen negative.

PDC Access to Modify Interpretation Factors: One change for PNS operations using SIS will be that Prenatal Diagnosis Centers (PDCs) will have access to view case information, schedule appointments, modify interpretation factors and send those changes to you for review and approval.

SIS Impact on Newborn Screening (NBS)

With the SIS application, there are a few instances in which NBS business practices will change. Following is a description of these changes.

New Forms

The following descriptions highlight important changes to the Test Request Form (TRF), the Result mailer, NBS Diagnosed Case form and the NBS Special Forms.

Test Request Form:

1. Additional information has been added to the Test Request Form (TRF).
2. TRFs will now be entered into SIS using Optical Character Recognition (OCR) technology. However, Newborn and Prenatal Screening Laboratories will have the ability to enter TRF data directly into SIS as well.
3. In addition, the format of the TRF has changed; it will no longer be attached to the filter paper.

Result Mailers:

1. Additional information has been added to the Result mailer, and it has a new format.
2. Users now have the option to generate a Result mailer for same-day delivery, bypassing the automatic 3-day hold. This will only happen if the mailer is complete and ready to go.

NBS Diagnosed Case Form:

1. This form will now be completed online by the Case Coordinator.
2. Both the format and content of this form have changed.
3. In addition, Case Coordinators will now enter this information into SIS as part of the case resolution, rather than sending a paper form to GDB after the case has been resolved.

NBS Special Forms:

The NBS OH, TR, MR and NO forms will now be entered into SIS by the NBS Monitor using OCR technology. If a form requires follow up, the Coordinator will receive a Headline Case, and will be able to update the form online.

New Functions

In addition to the changes mentioned above, SIS will provide Case Coordinators with access to more functions than you have had in the past. Following are descriptions of these new functions.

Tracking Events: This is a function in SIS that will help the user to track actions related to a case. For example, “Clinician notified of inadequate specimen" is a tracking event; entering this tracking event will add a note to the case history.

Case Notes: Users will have the ability to track notes about a case online using SIS. The notes will be stored in SIS and you will have access to refer to them anytime.

Updating a Client or Case: Case Coordinators will have access to modify patient and/or case data in SIS.

Transferring Cases: Case Coordinators will have access to transfer a case to another Case Coordination Center (CCC) in SIS.

New Headline Cases: Case Coordinators may receive four new types of Headline Cases: 1) Transfused, 2) A only Hemoglobins, 3) MS/MS and CAH, 4) NBS Forms, 5) CF, and 6) BD.

2.0 Quick Start Guide

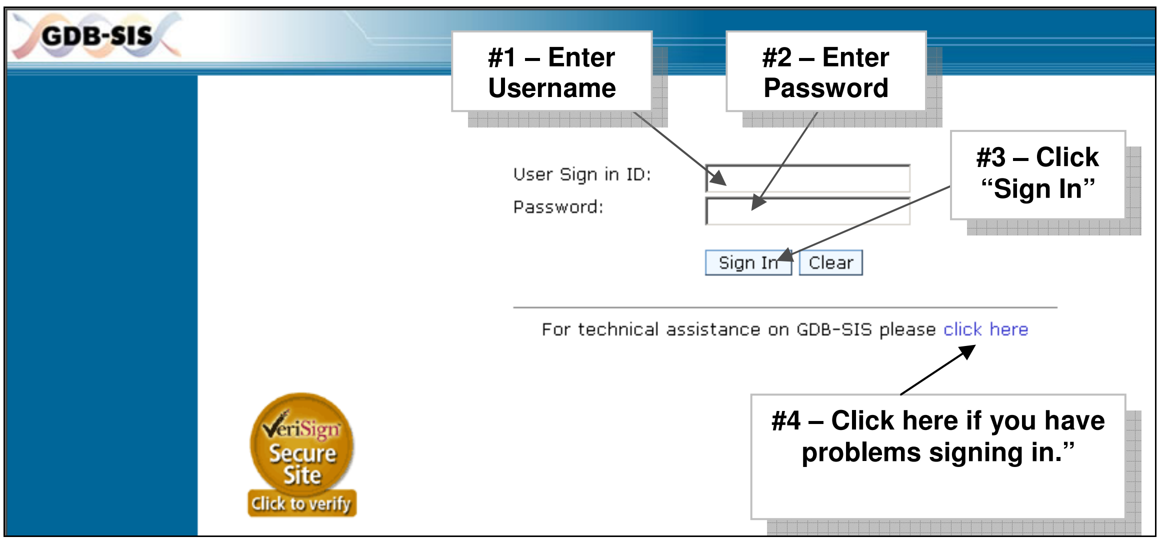
Quick Start Guide

This Quick Start Guide provides basic information about how to access the screens where work will normally be started. More detailed information for all of the SIS screens and how to locate records in SIS is located in the following pages

Logging into SIS

To begin using SIS, you must first log in to the system. Each SIS user has his/her own unique username and password. Users will be prompted by the system to change their passwords every 60 days.

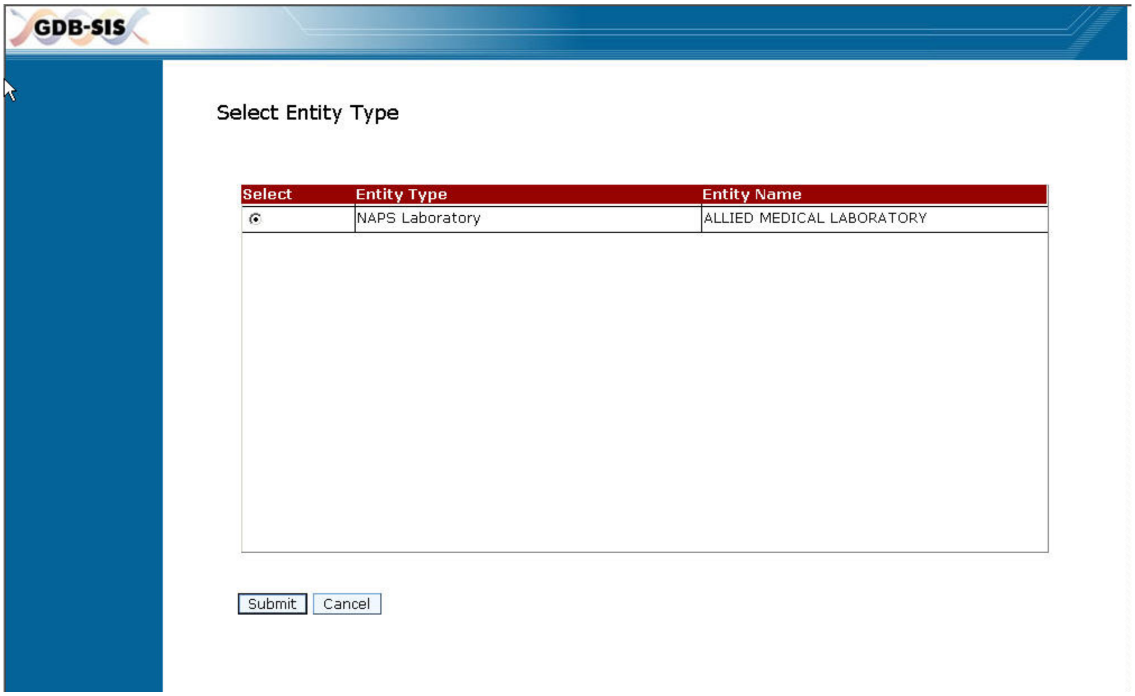
The first screen you will see after entering the SIS URL (http://sis.ext.dhs.ca.gov) is the Login Screen – see below. To log in, enter your username in the "User Sign in ID" field (#**1**) and your password in the "Password" field (#**2**). Then click the "Sign In" button (#**3**) and SIS will validate your login information and allow you to enter the system if your data was entered correctly and you have a user account.



If you experience problems logging in, first verify that you are typing your login information correctly. If you are still experiencing problems, click the link for technical assistance (#**4**).

Viewing your "Homepage"

After logging in you will be see the Select Entity Type screen. Select the entity type you wish to log in as, and click **Submit** button.



You will be directed to a "SIS homepage" or the first screen you will see each time you login to SIS. The homepage will be different for each user type. You may be required to enter information such as Center Code and you will then be directed to the screen at which you will normally start your work. Following are descriptions of each homepage.

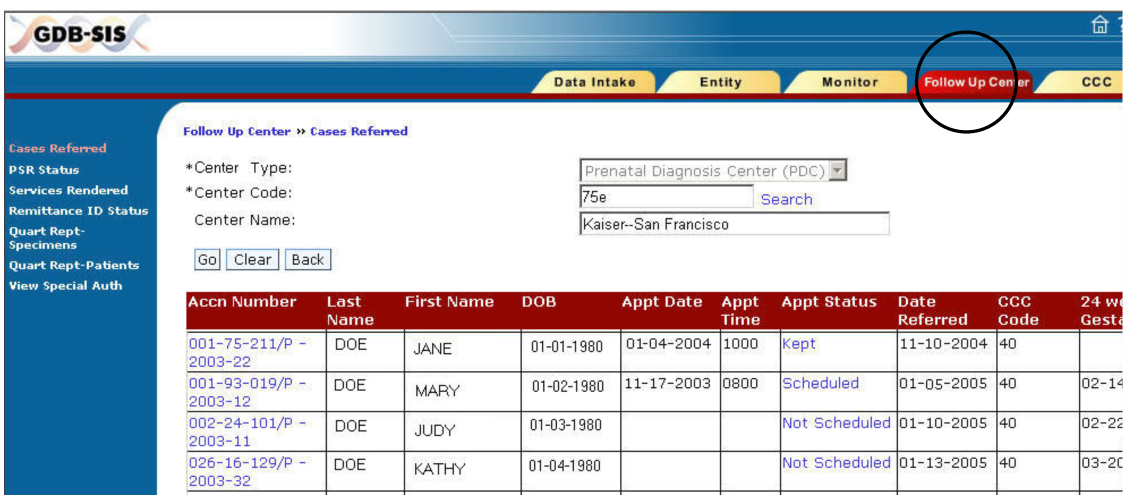
The following screens are the most common starting points. For more detailed descriptions of these screens refer to the User Manual.

CCC: Headline Cases.

Allows you to view all Headline Cases assigned to your CCC. Click the **Download New Cases** button to view new cases.

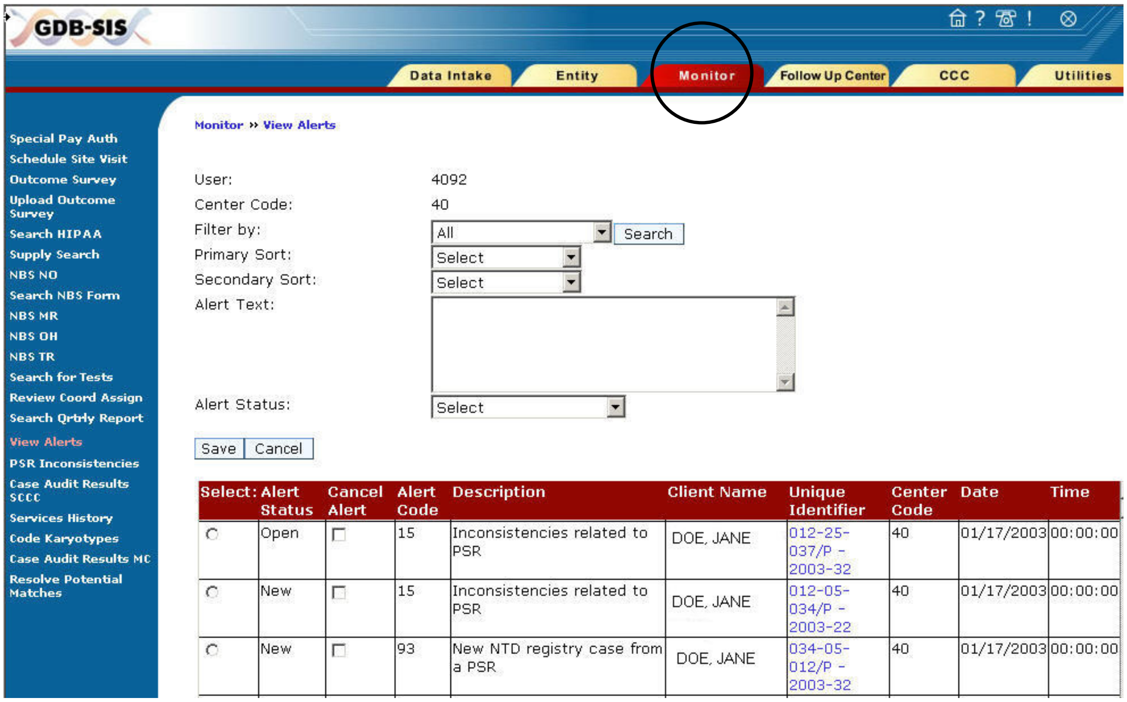
Follow-Up (PDC, SCCC, MC): Cases Referred

Allows you to view your referred cases. You must enter your **Center Code** and click the **Go** button.



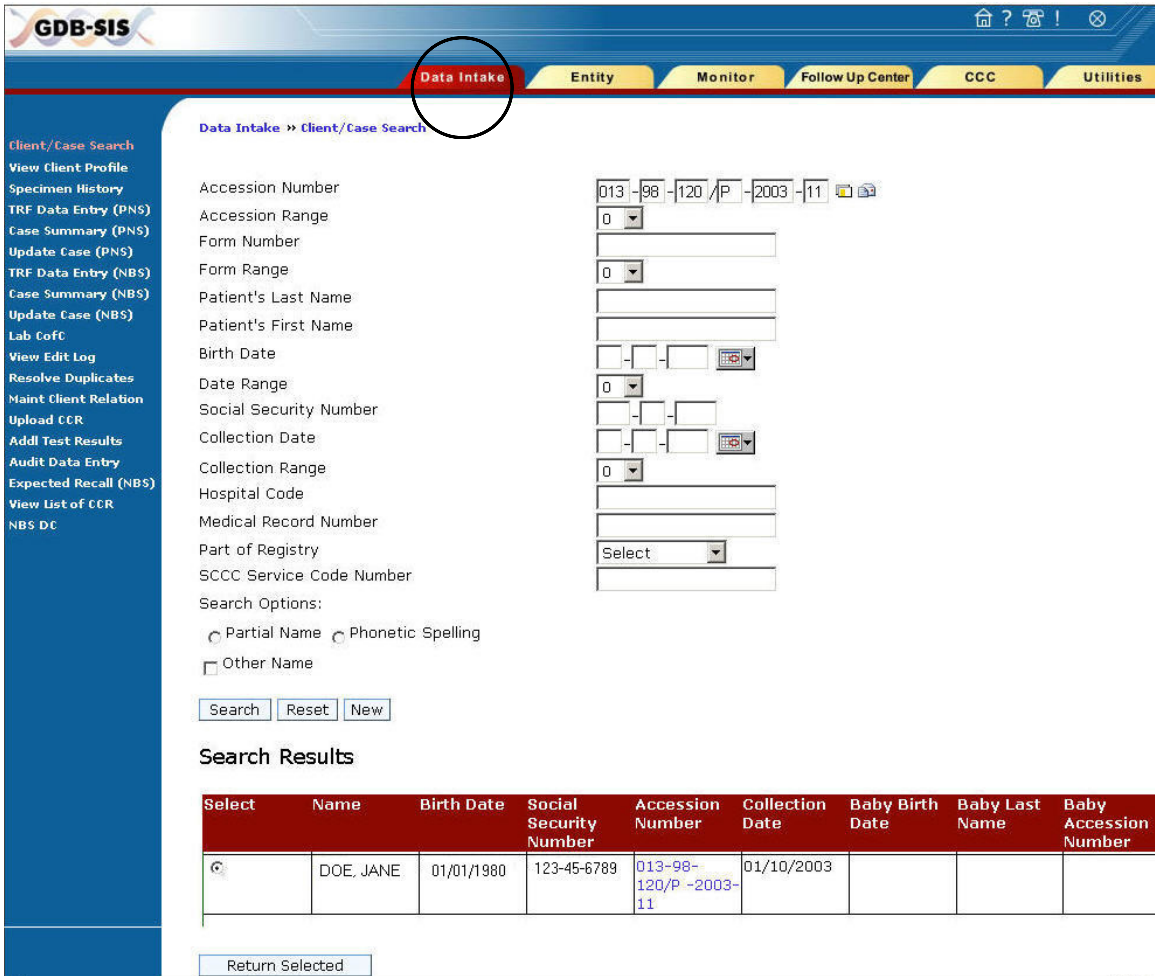
Monitor (PNS, NBS, PSQA, PDES): View Alerts

Allows you to view your Alerts. You may enter filter criteria and then click the **Search** button or click the **Search** button with no filter criteria to see a complete list.



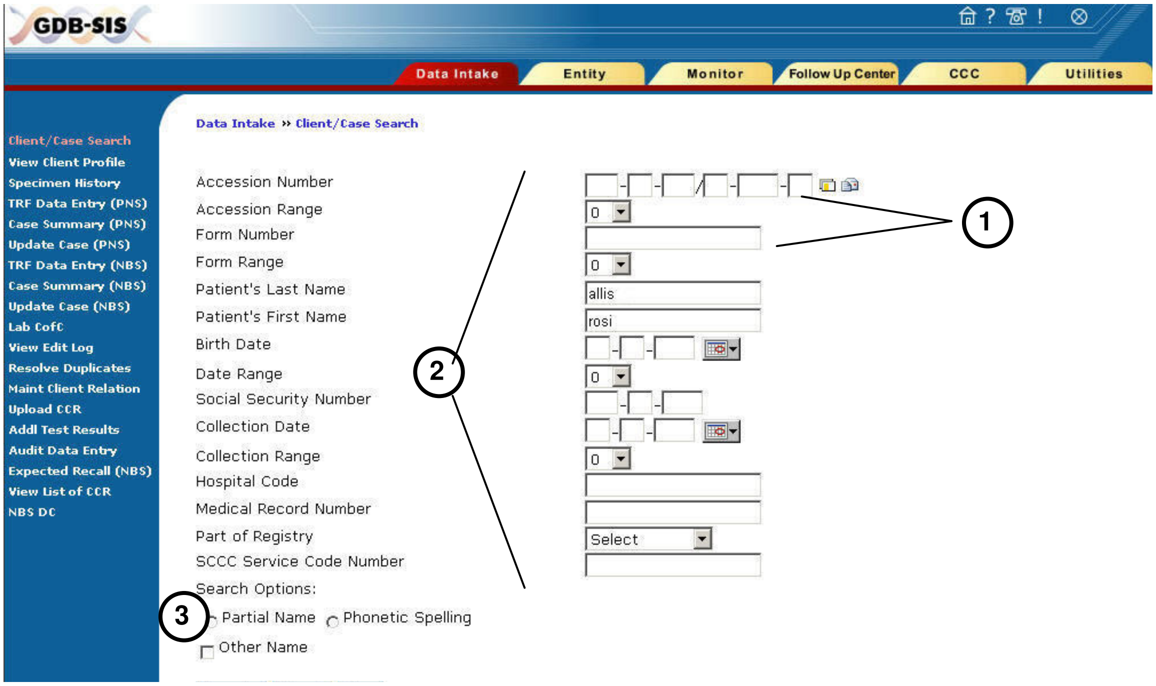
Laboratories (NAPS, GDL, Confirmatory): Client/Case Search

Allows you to search for a client or case record. Enter your search criteria and then click the **Search** button.



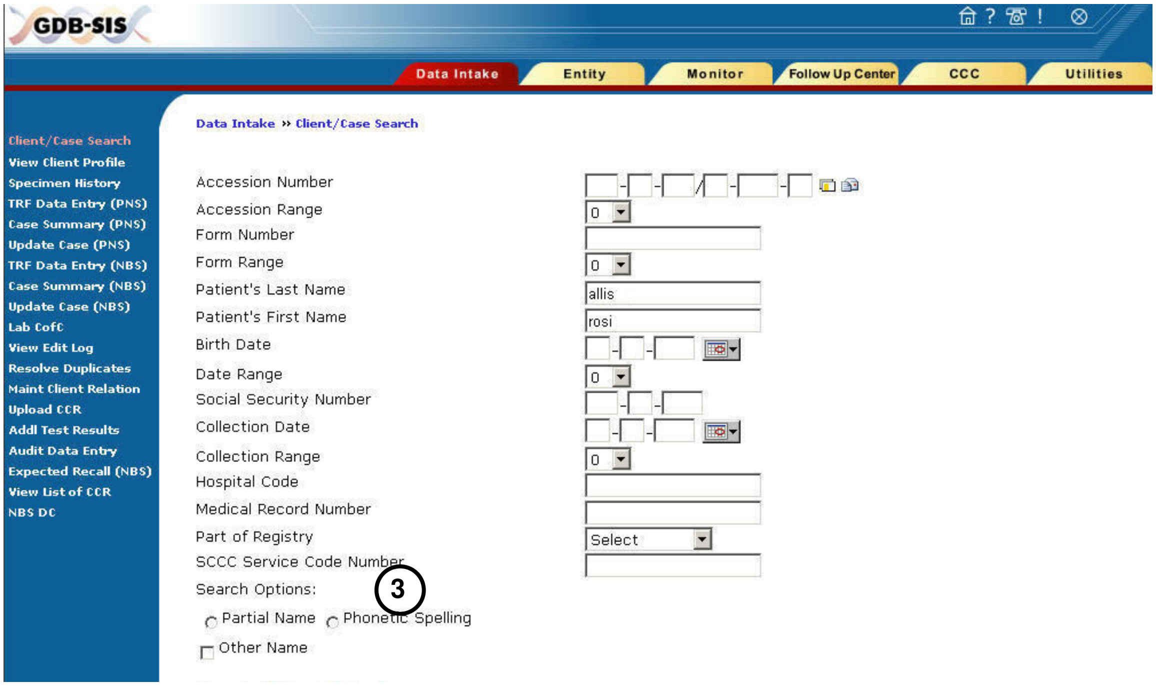
Client/Case Search

The Client Case Search screen is used to locate existing client or case information in SIS. You may search using the Accession Number or Form Number alone, or by entering at least two other search criteria together.



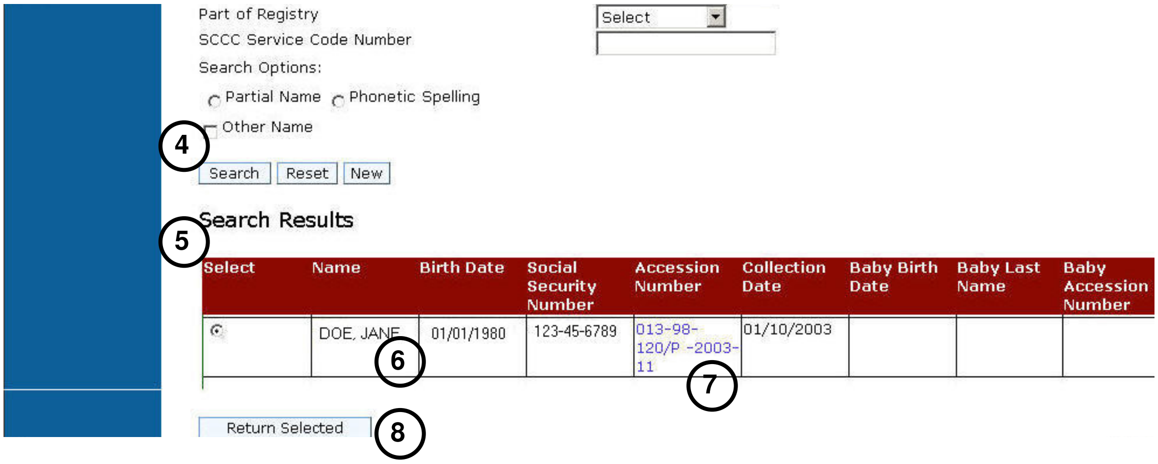
1. **Accession Number** or **Form Number** can be used individually as search criteria.
   a. **Accession Range** allows you to specify a range of sequence numbers to return in the search. For example, if "5" is selected, the search will only return accession numbers with a sequence number 5 above, and 5 below your specified accession number.
   b. **Form Range** allows you to specify a range of form numbers to return in the search. For example, if "5" is selected, the search will only return forms with a form number 5 above, and 5 below your specified form number.
2. If neither the Accession Number nor Form Number is available, at least two of the remaining fields must be used together in order to search.

Client/Case Search (continued)



3. **Search Options** allows you to specify the type of search you wish to perform.
    a. **Partial Name** allows you to enter part of a name, and return all matching records.
    b. **Phonetic Spelling** allows you to enter the phonetic spelling of a name, and return all matching records.
    c. **Other Name** allows your search to include both "aliases" and primary name, and return all matching records. An Alias can be entered for a client through the Update Name 3rd level link on the Client Profile screen which allows you to enter additional names for a client.

Search Results Grid



4. **Buttons**:
    a. **Search** button will initiate a search based on the search criteria you have entered.
    b. **Reset** button, when used before you click the Search button, will clear all information from all fields. When used after you have clicked the Search button, the Reset button will clear all search criteria fields, as well as any search results in the Search Results grid.
    c. **New** button will direct you to the Client Profile screen, and allow you to create a new client.
5. **Search Results** grid will display all records that match your search criteria. For PDC, MC, and SCCC users only, the Search Results will only display data related to your job function. For example, PDC users will only be able to view cases that have been referred to their PDC. If the search returns more than 50 results, a warning will display, requiring you to refine your search criteria.
6. Clicking the **Name** link will direct you to the View Client Profile Screen.
7. Clicking the **Accession Number** link will direct you to the Case Summary screen.
8. If you have been directed from another screen to the Client / Case Search screen, click the radio button next to the record you want to view, and click the **Return Selected** button. You will be redirected back to the screen you came from, and your selected client / case information will be displayed.

3.0 Screen Descriptions by Name

Add New Entity

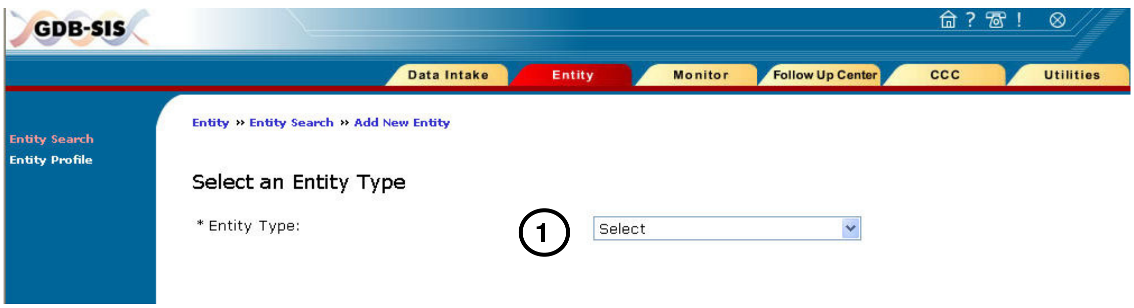
Entity >> Entity Search >> Add New Entity

The **Add New Entity** screen is used to create new entity records in SIS. An example of an entity can be, but is not limited to a person, a hospital or a laboratory. There are established entity types in SIS. To add an entity you must first search for the entity on the Entity Search screen.

The fields displayed in the **Add New Entity** screen depend upon the Entity Type. For example, when adding a PDC-type entity you must identify the Organization Name in SIS. Whereas, when adding a person-type entity you must identify the person's First Name and Last Name.

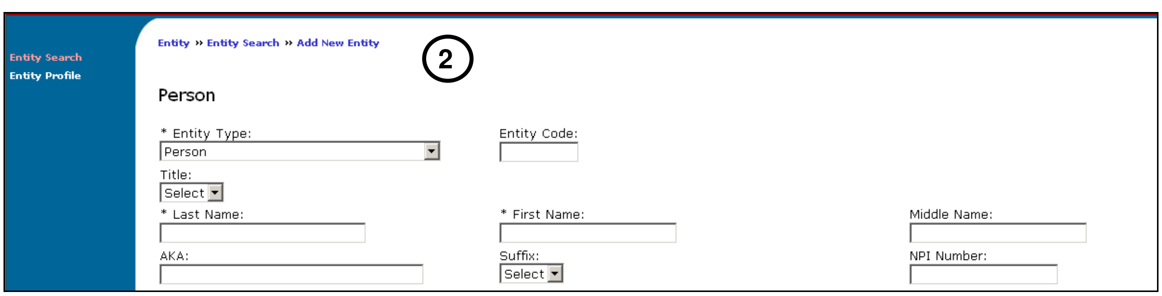
Following is an example of one Entity Type screen.

FIGURE 1



1. Select an **Entity Type** to display the entity-specific fields (see **FIGURE 2**).

FIGURE 2

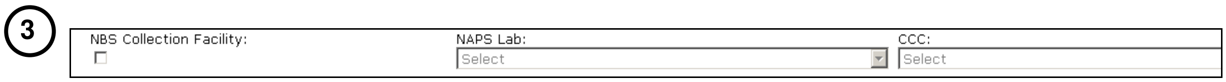


2. Enter the new entity's information in the fields provided. Depending on the type of entity, at least two of the following required fields will be present.

Entity Type	**Organization Name**
First Name	**Last Name**
PDC Type	**Program Area**
Hospital Type	

Add New Entity (Continued)

FIGURE 3



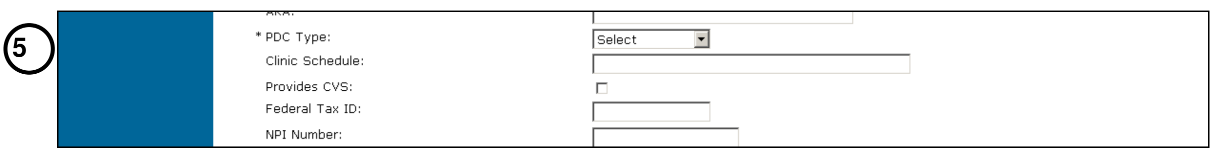
3. If the New Entity is an **NBS Collection Facility** it is important that you check this box and select the associated NAPS Laboratory and/or CCC from the dropdown.

FIGURE 4

4. You can enter the license information for the entity on this screen. The **License Number** field has specific format requirements. For information about the format requirements for License Number entries, refer to Appendix G – License Number Format Structure.

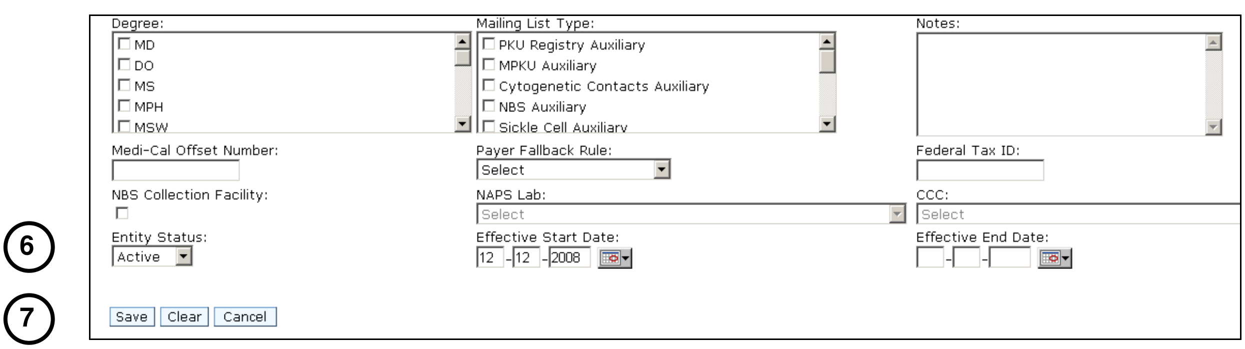
Note: You can add license information in the Add New Entity screen; however you must use the License screen to update any license information that has been saved.

FIGURE 5



5. As part of PE-II, "Provides CVS"field is added for the entity type PDC to identify whether PDC will provide CVS services.

FIGURE 6



Add New Entity (Continued)

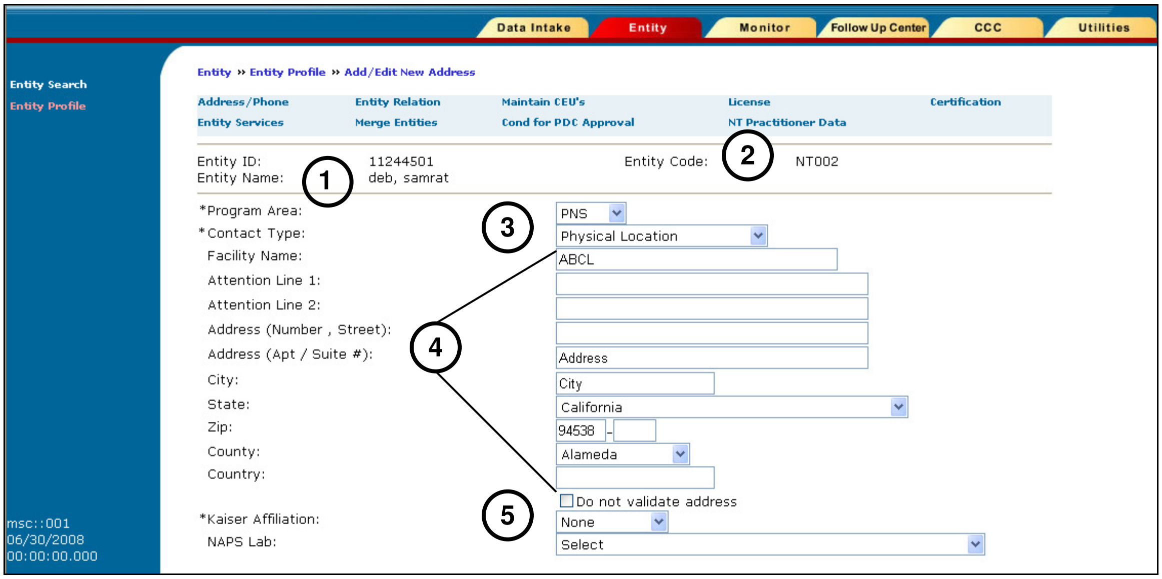
6. The **Entity Status** field is automatically set to "Active" and the **Effective Date** field is automatically set to the current date
7. **Buttons**:
    a. Click the **Save** button to save the new entity information you entered.
    b. Click the **Clear** button to clear the contents of the fields discarding any changes you made.
    c. Click the **Cancel** button to return to the Entity Type selection described in **FIGURE 1**

Add/Edit New Address

Entity >> Entity Profile >> Add/Edit New Address

The **Add/Edit New Address** screen is used to create a new address record or update an existing address record for an entity in SIS.

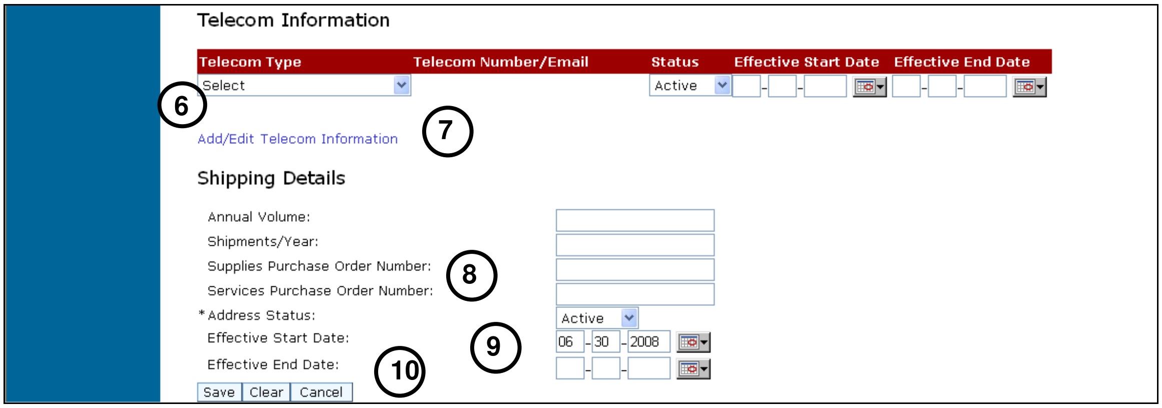
FIGURE 1



1. Displays information about the entity that is currently selected.
2. The user can update address information for selected entity.
3. **Program Area** and **Contact Type** are required fields. For Contact Type, select the type of address you wish to edit (i.e. Physical Location, Billing Address, etc.).
4. Address Information: SIS will automatically attempt to validate addresses entered. If possible, SIS will update the address information to a recognized address. For example, if you've entered 1234 Oak Dr., and the address validation program recognizes only a 1234 Oak St., it will automatically update the address information. If you elect to use the address validation feature you should verify any corrections SIS makes to the address you have entered.
5. **Do not validate address** – Checking the box will deactivate the address validation feature. **Kaiser Affiliation** is a required field.

Add/Edit New Address (continued)

FIGURE 2



6. Select a **Telecom Type** and enter the telecommunication (i.e. phone, fax, or email) information for the entity. Once you have selected a Telecom Type, the **Telecom Number**/**Email** fields will be displayed and can be updated on this screen.

   Note: When creating a new address five empty telecom type boxes will be available on this screen. When updating an existing address only the existing telecom types will be available on this screen. In this case, use the Add/Edit Telecom Information link to create new telecom records for the entity.

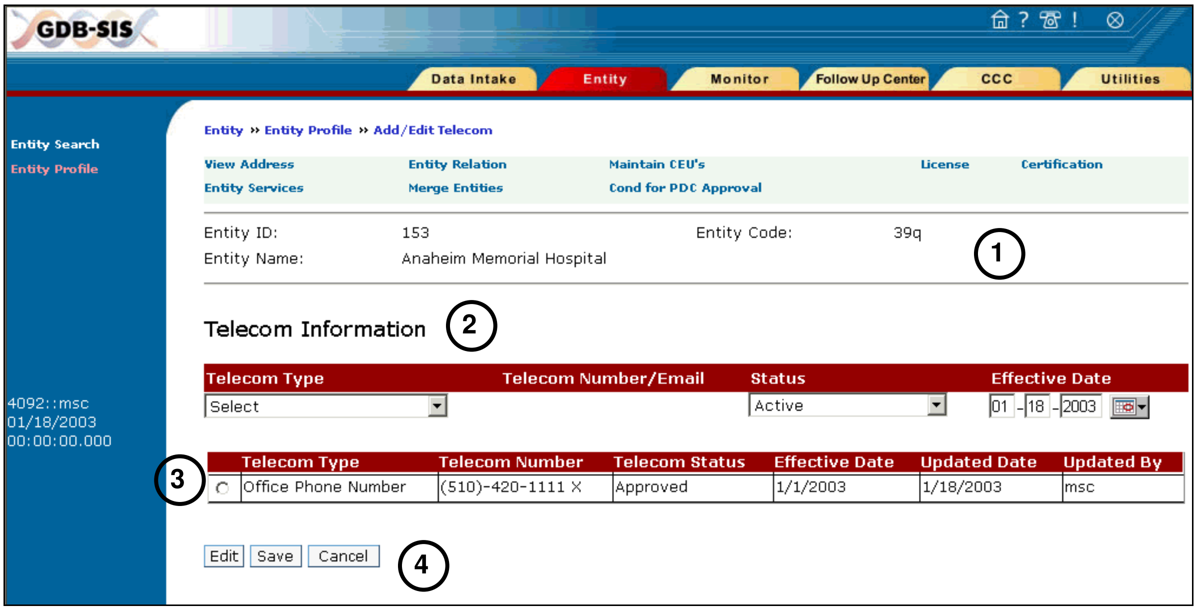
7. You may also click the **Add**/**Edit Telecom Information** link to edit existing telecom information or create new telecom entries.
8. **Shipping Details**. Enter any shipping information that pertains to the address you have entered.
9. **Address Status** is a required field. If you select “Effective Date Status” from the dropdown you can enter an effective date on which the address will become Active.
10. **Buttons:**
    a. Click the **Save** button to save the address and telecom information that you have entered.
    b. Click the **Clear** button to clear all fields and discard any unsaved address and telecom information.
    c. Click the **Cancel** button to return to the View Address screen and discard any unsaved address and telecom information

Add/Edit Telecommunications

Entity >> Entity Profile >> Add/Edit Telecom

This screen enables users to add new or edit existing telephone numbers, fax numbers and email addresses for an entity. You can access this screen by clicking on the Add/Edit Telecom Information link on the Add/Edit New Address screen.

FIGURE 1



1. Entity information will be displayed in a read-only format based on the entity profile.
2. **Telecom Information** grid allows you to add a new telecom entry by selecting a value for Telecom Type and entering a phone number or email address in the Telecom Number/Email, Status and Effective Date fields. If you select an existing telecom record in the grid below it will become available for editing in this grid.
3. Select one of the existing telecom records in the Telecom Information grid using the radio button and click the **Edit** button to change it. The selected telecom record will become available for editing in the telecom information grid.
4. **Buttons**:
   a. Click the **Edit** button to edit existing telecom information after selecting the desired record from the grid using the radio button.
   b. Click the **Save** button to save the new or updated telecom record.

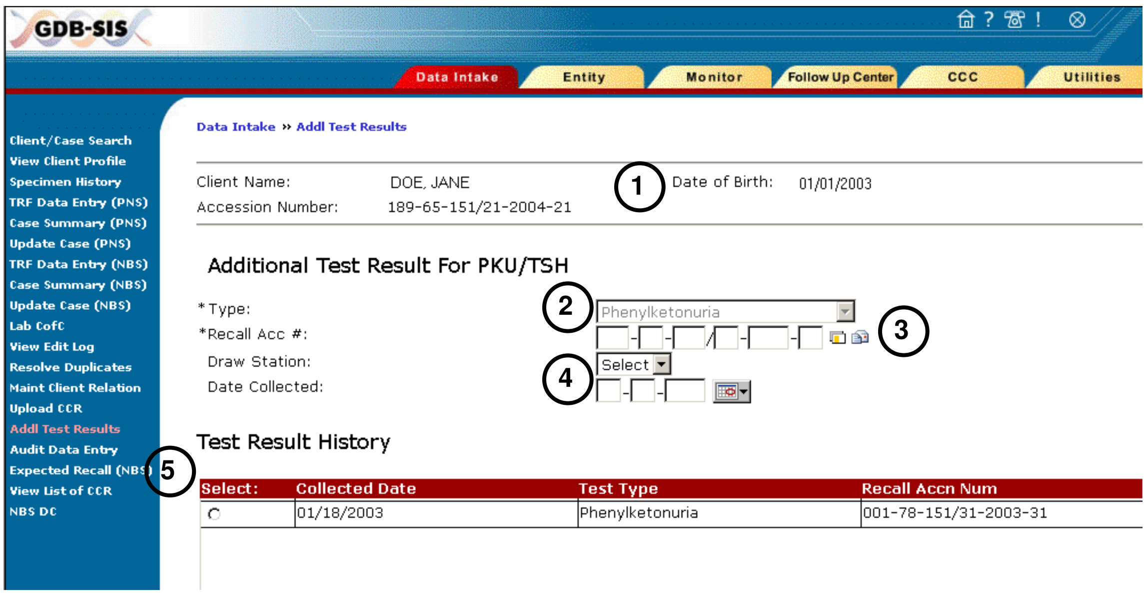
   Click the **Cancel** button to return to the Add/Edit New Address screen discarding any unsaved changes.

Additional Test Results

Data Intake >> Addl Test Results

This screen will allow a confirmatory laboratory to enter confirmatory test results for PKU, Hypothyroidism, Galactosemia, and Hemoglobin disorders. Additionally, it will allow the user to capture whether a new sample has been collected for CFTR sequencing. In order to access this screen, you must already have a case loaded from your Expected Recall (NBS) list. This list is accessed using the Expected Recall (NBS) 2nd level link from side of the screen.

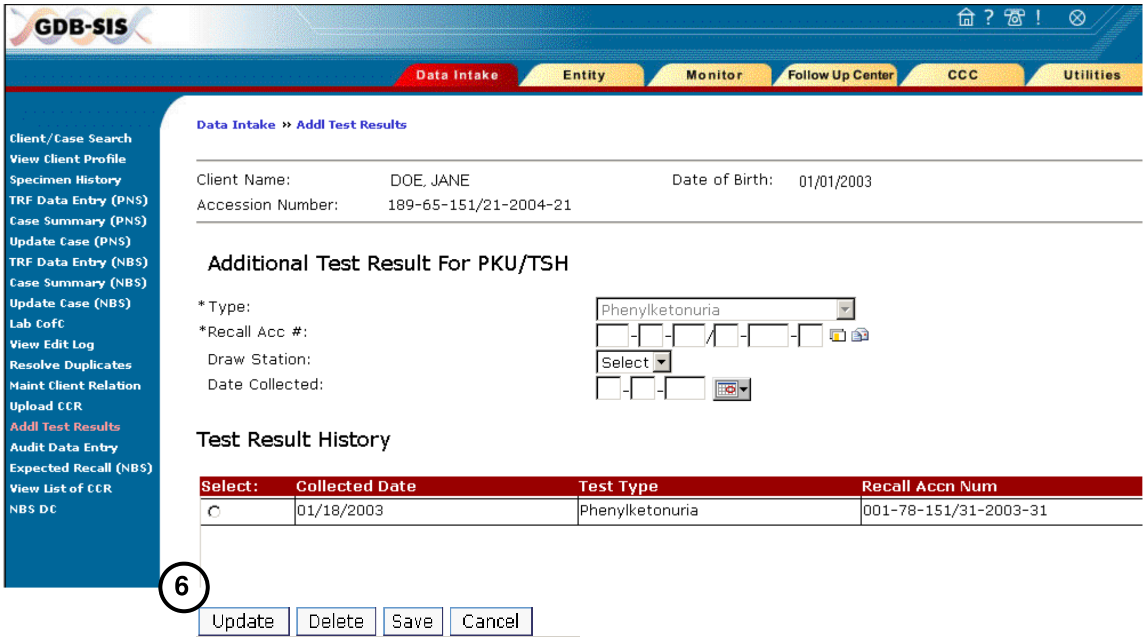
FIGURE 1



1. Client information is displayed in a read-only format based on the client profile.
2. The **Type** of test is a required field (Phenylketonuria) and is pre-filled based on the Expected Recall (NBS) screen.
3. The **Recall Acc #** is a required field.
4. Additional Test Results information. **Draw Station** and **Date Collected** may be entered.
5. **Test Result History** grid displays new entries, and entries for recall test results entered in the past, if any. A new row will be added to this grid after you save additional test results.

Additional Test Results (continued)

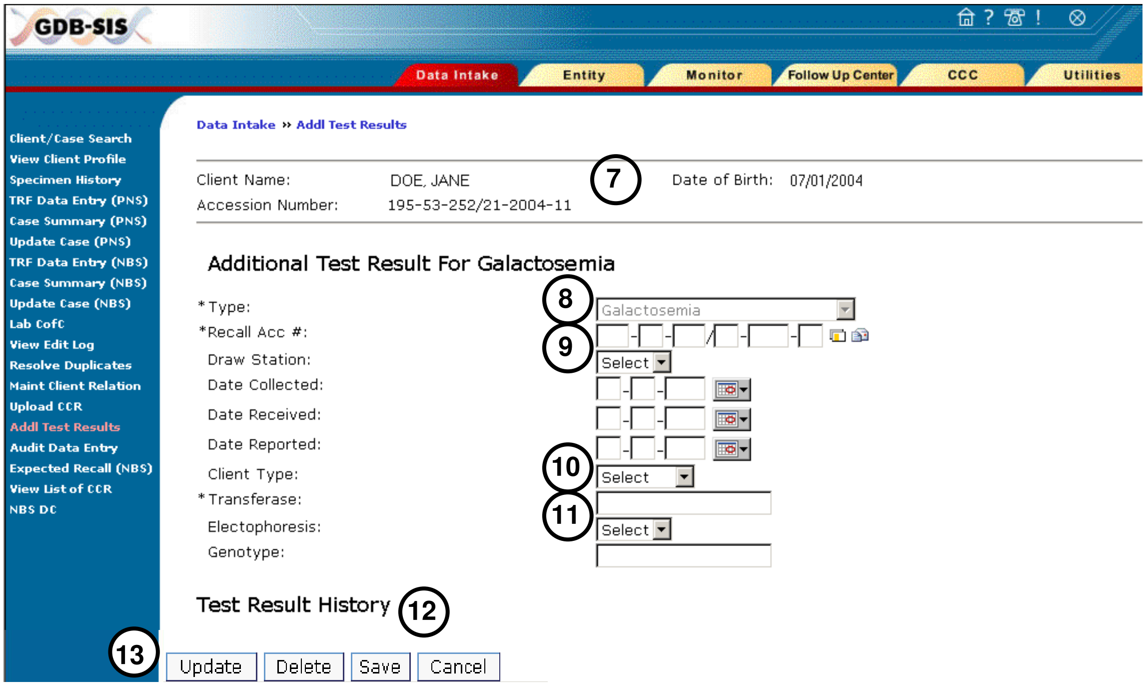
FIGURE 2



6. **Buttons**: Click the radio button next to an entry in the Test Result History grid to **Update** or **Delete** existing results.
    a. Click the **Save** button to save the test results you have entered or changed.
    b. Click the **Cancel** button to cancel the current Add or Update action and bring the page to view mode, where only the test result history grid is displayed.

Additional Test Results (continued)

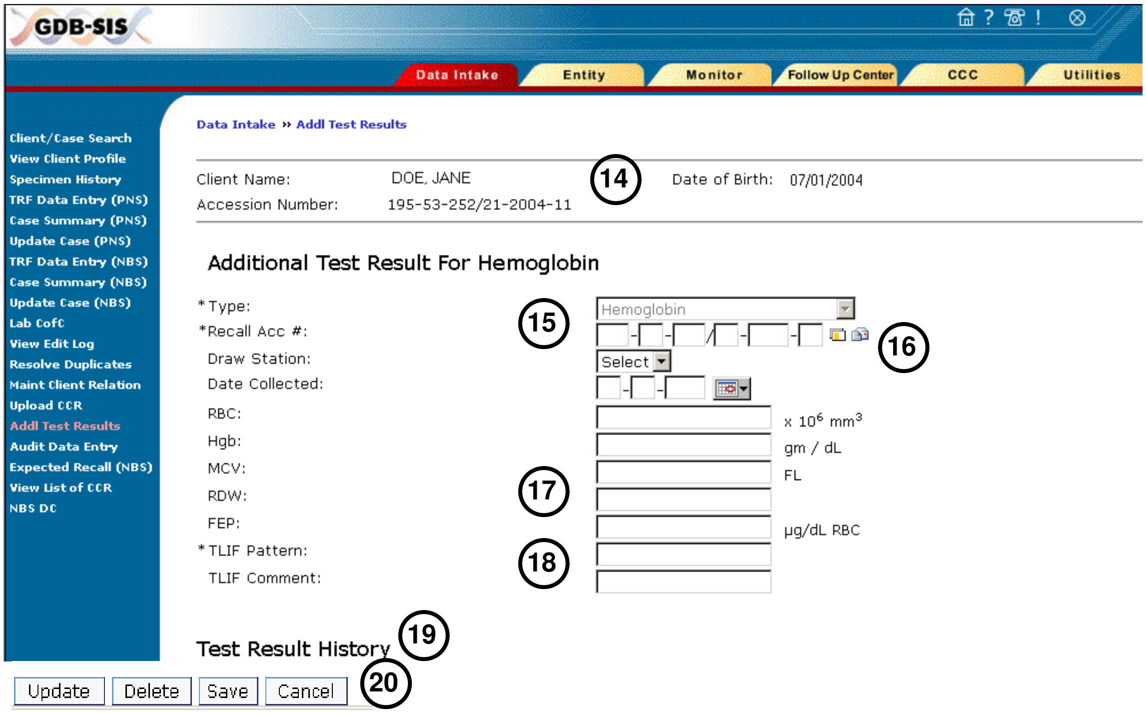
FIGURE 3



7. Client information is displayed in a read-only format based on the client profile.
8. The Type of test is a required field (Galactosemia) and is pre-filled to match the Expected Recall (NBS) grid entry. Only one test may be entered at a time.
9. The Recall Acc # is a required field.
10. Additional Test Results information. **Client Type** may be: New Born, Mother, or Father.
11. Transferase is a required field.
12. Test Result History – See **FIGURE 1**.
13. **Buttons** – See **FIGURE 2**.

Additional Test Results (continued)

FIGURE 4



14. Client information is displayed in a read-only format based on the client profile.
15. **Type** of test is a required field (Hemoglobin) and is pre-filled to match the Expected Recall (NBS) grid entry. Only one test may be entered at a time.
16. **Recall Acc #** is a required field.
17. **Additional** Test Results information.
18. **TLIF Pattern** is a required field.
19. **Test Result History** – See **FIGURE 1**.
20. **Buttons** – See **Figure 2.**

Appointments

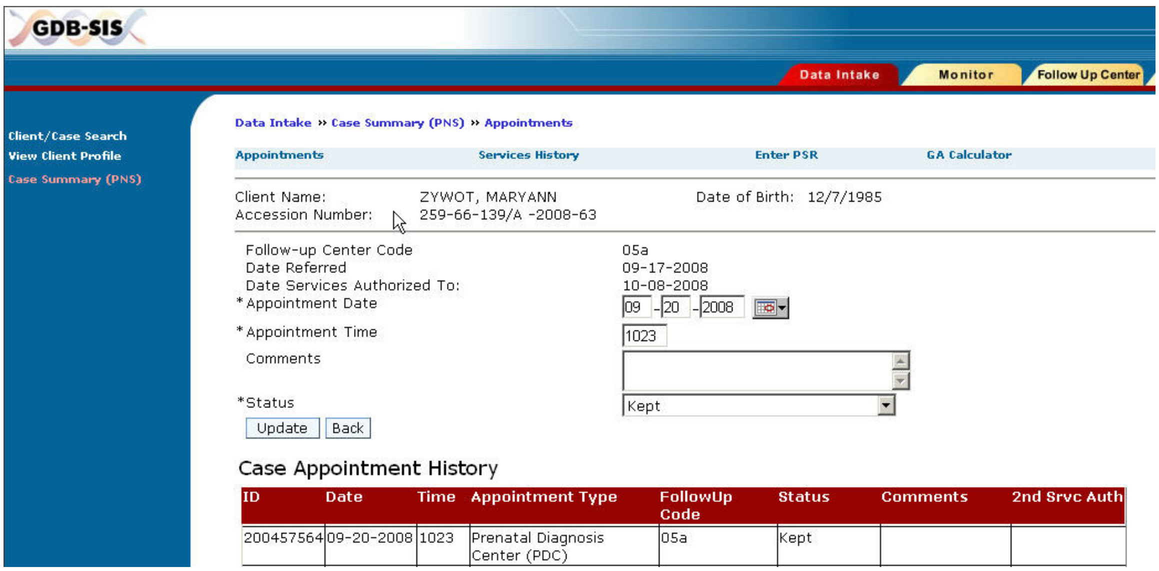
Follow Up Center >> Cases Referred >> Appointments

The **Appointments** screen will allow you to view Case Appointment History information for a client at a specific Prenatal Diagnosis Center (PDC), Sickle Cell Counseling Center (SCCC), or Metabolic Center (MC). In addition, you can schedule appointments or update the status of appointments from this screen.

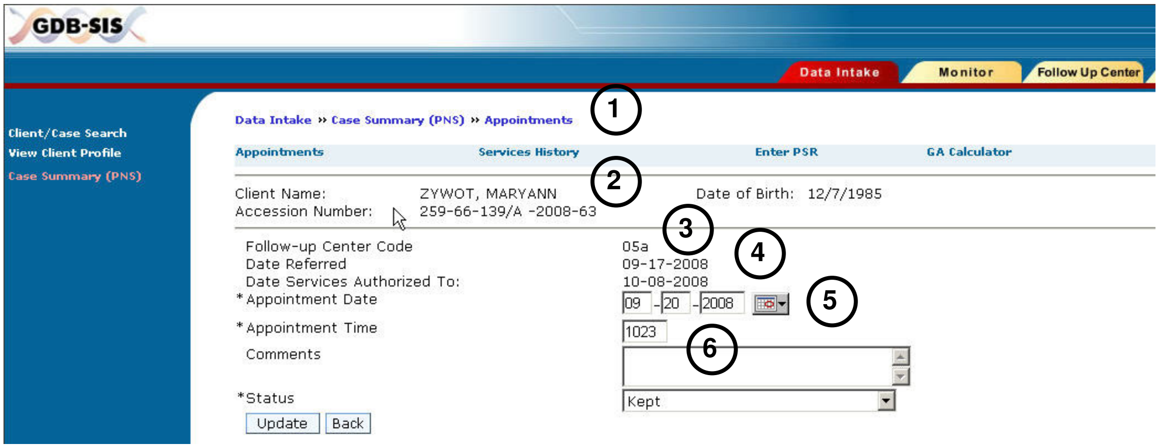
Before scheduling an appointment, a case must first be referred to you in SIS by the Case Coordinator. If you attempt to schedule an appointment for a case not in your Cases Referred list, you will receive a SIS error message and will not be able to schedule the appointment.

FIGURE 1 describes the **Appointments** screen for PDCs and SCCCs (On the SCCC screen gestation age is blank). The Metabolic Center Appointments screen is very similar but contains two additional fields, described in **FIGURE 4**, and does not display gestation age.

FIGURE 1



Appointments (continued)

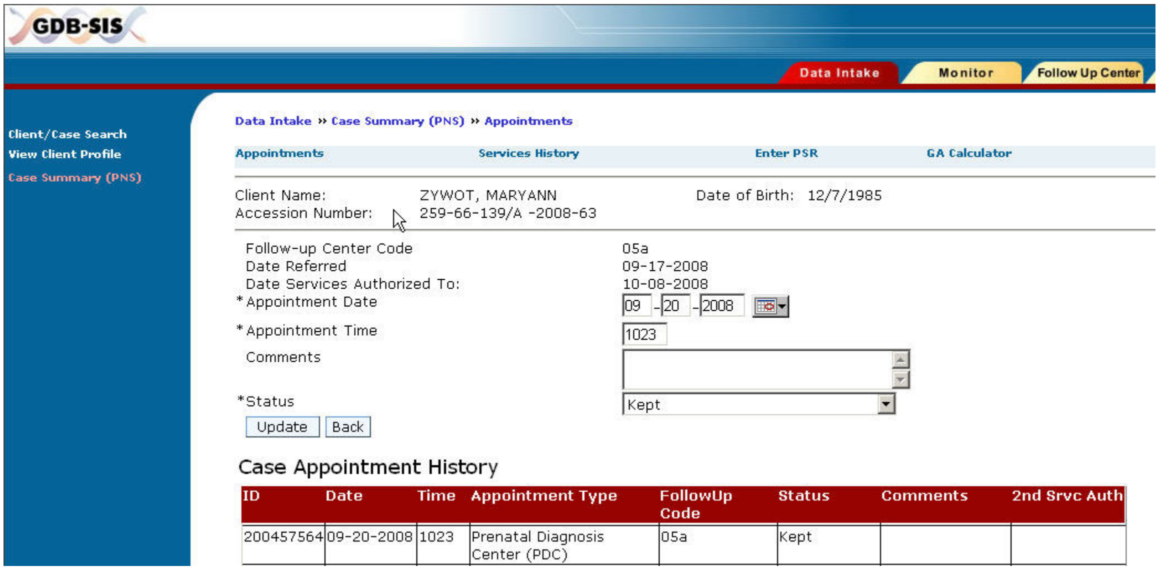


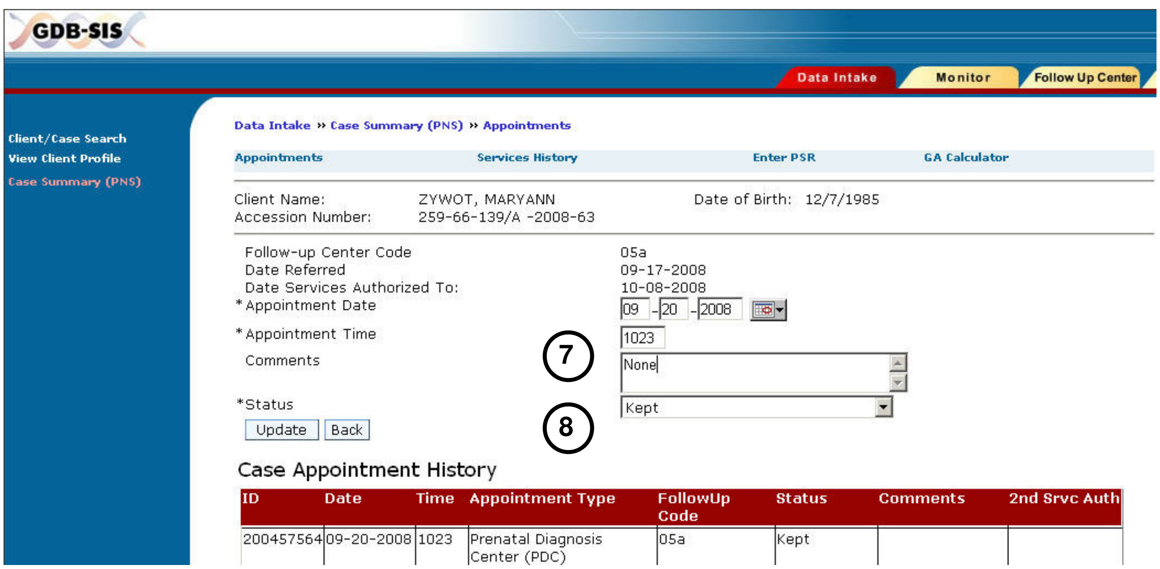
1. Navigation and screen name.
2. The Client information is displayed in a read-only format based on the client profile information.
3. **Follow-Up Center Code** and the **Date Referred** (date the client was referred to your center) are displayed in a read-only format.
4. For a PDC the "**Date Services Authorized To** is also displayed in a read-only format, based on the Case Summary information.). It is 14 weeks 6 days or 24 weeks 0 day. Once a 1st T. Referral reaches 15 weeks 0 days, the date field is calculated for GA of 24 weeks 0 days, unless the appointment has been "kept" or the case has been closed with another closing Tracking Event. If a PDC attempts to schedule an appointment for a patient who is beyond 24 weeks gestation, a warning will be displayed: "Gestational age is over 24 weeks. Special authorization required."

5. Enter the **Appointment Date** in the Appointment Date field (mm-dd-yyyy) or use the dropdown calendar to select the date. This is a required field.
   a. When a case has been referred, but an appointment has not been scheduled in SIS within the established time period, both the CCC and the follow-up center will receive alerts.
      - CCC Alert: "Appointment has not been scheduled. Please follow-up with physician."
      - Follow-up center Alert: "Appointment has not been scheduled. Please follow-up with coordinator."
   b. The date of the appointment must be at least one day greater than the Accession date.
6. Enter the **Appointment Time** in 24-hour military format. This is a required field. If an appointment time is not scheduled between the hours of 0800 and 1700 a warning will be displayed: "The recommended appointment times are between 0800 and 1700. Do you wish to continue?"

Appointments (continued)

FIGURE 2





7. Text comments may be entered in the **Comments** field. In this field you should document the reason why a patient missed or cancelled an appointment or the reason why her appointments are on different days.
8. Select the Appointment **Status** from the dropdown. This is a required field. You must update this field to reflect the current appointment status. For example, if the appointment has been given the **Status** of “Scheduled”, and the patient keeps the appointment, you should update the **Status** to “Kept.”

Appointments (continued)

a. Whenever you change the appointment status, a row is added to the **Case Appointment History** grid (see # 10), and a diaried event (log of all actions in a case) is created for the case. Diaried events can be viewed from the Tracking Events screen.

Status Selections:

a. **Scheduled** – Use this to indicate that a patient has scheduled an appointment with your follow up-center. If the status of an appointment is not changed within two days after the appointment time and date, the follow-up center will receive an alert: "Appointment time and date has passed. Please update appointment status."

b. **Kept** – Use this to indicate that a patient has kept an appointment. An appointment status of "Kept" cannot be entered before an appointment is scheduled. For PDCs, once you have indicated that the appointment was kept, the status of the case on the Case Summary screen will be changed to "Case Closed-Appointment Kept". Once the case is closed for a client referred to a PDC, the PDC will have access to the **Enter PSR** screen for this case.

c. **No Show** – Use this to indicate that a patient did not cancel nor keep an appointment. When the status of "No Show" is selected, the CCC will receive an alert: "Patient Appointment No show. Please follow up."

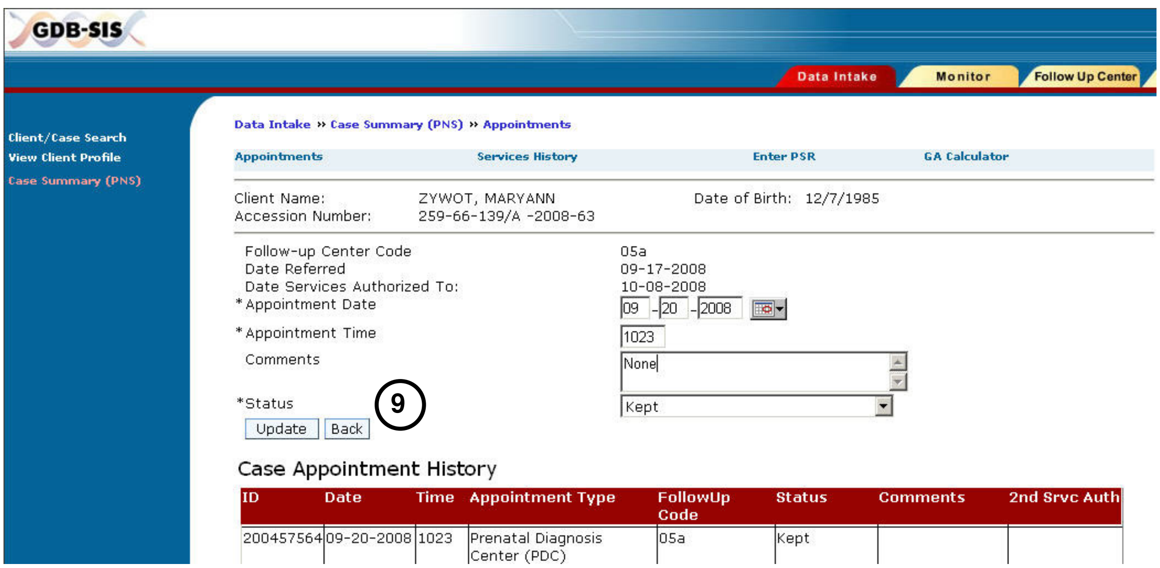
d. **Cancelled** – Use this to indicate that a patient cancelled an appointment. If a patient calls to reschedule an appointment, you should first cancel the original appointment, and then schedule the new appointment. When the status of "Cancelled" is selected, the CCC will receive an alert: "Patient Appointment Cancelled. Please follow up."

e. **GC Kept** – Use this to indicate that a patient has kept an appointment in 1st Trimester. An appointment status of "GC Kept" cannot be entered before an appointment is scheduled. For PDCs, once you have indicated that the appointment was GC kept, the status of the case on the Case Summary screen will be changed to "GC Appointment Kept". Once the case is closed for a client referred to a PDC, or the case has been referred to another PDC, the first PDC will still have read only access to the appointment screen for this case.

f. **Error Appt. Not Kept –** This is not an appointment status however this can be invoked just after an appointment was entered as "Kept" or "GC Kept" erroneously. By invoking this status the appointment status will be reverted back to "Scheduled".

Appointments (continued)

FIGURE 3 – PDC



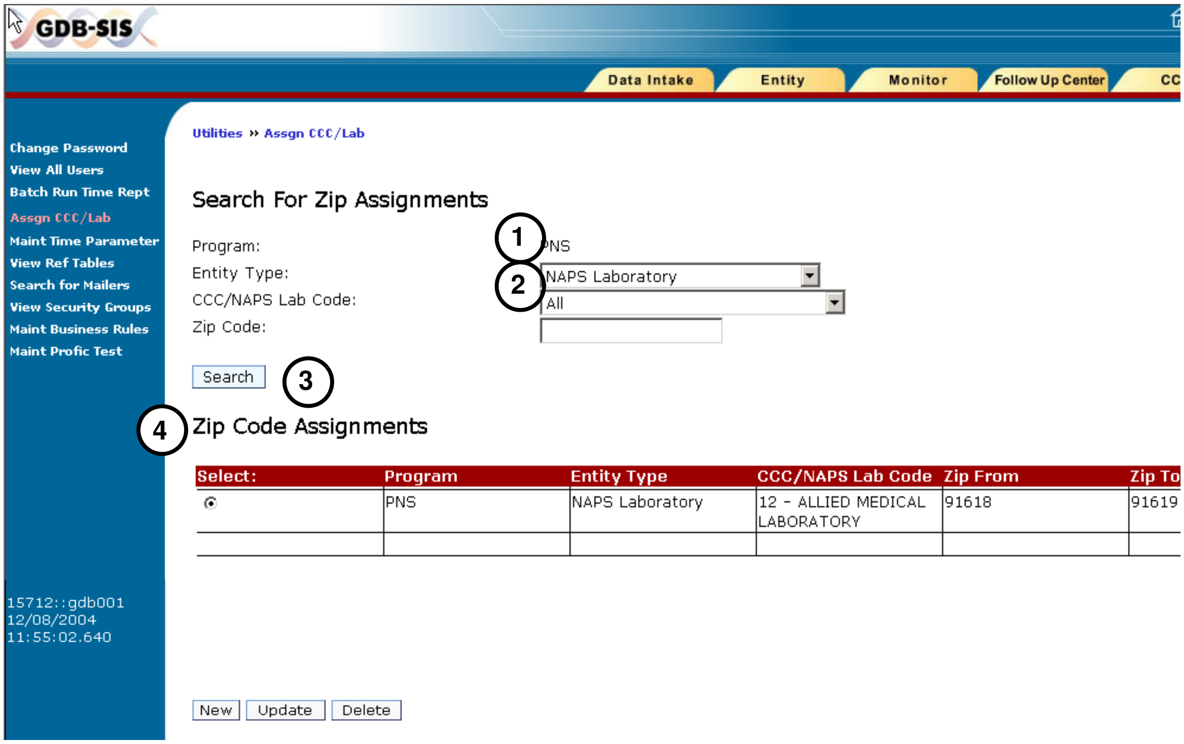
9. **Buttons**:
    a. Click the **Update** button to save the Appointment information. Address any error messages to continue (e.g. Trying to use status "GC Appt Kept – Dx Not Scheduled" when GA is over 14 wks 6 days will result in an error message).
    b. Click the **Back** button to display the previous screen in SIS, discarding any unsaved additions or changes.

Assign CCC/Lab

Utilities >> Assign CCC/Lab

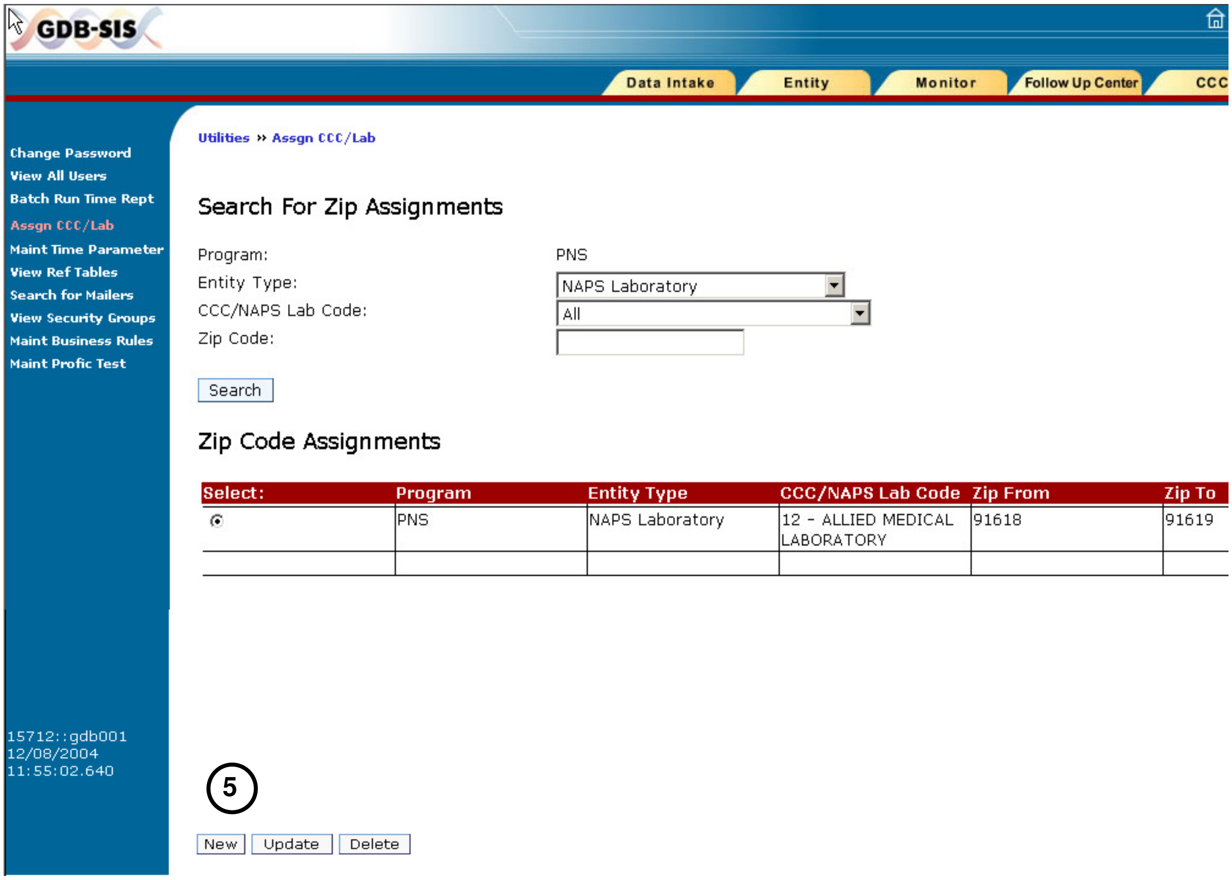
This screen allows you to search for Zip code ranges assigned to a CCC for PNS cases or a NAPS Laboratory, update existing assignments or add new assignments.

FIGURE 1



Assign CCC/Lab (continued)

FIGURE 2



5. **Buttons**:

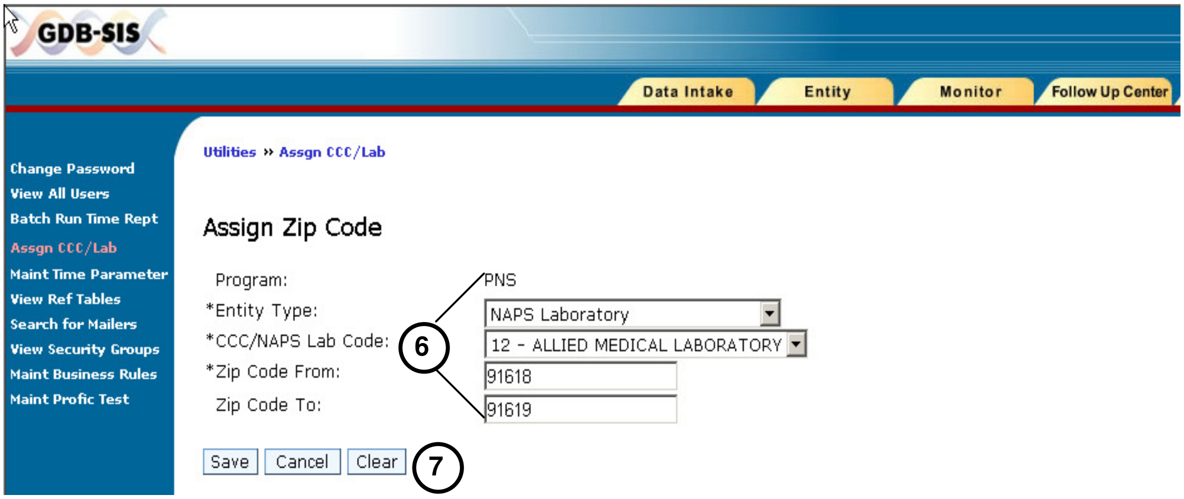
   a. **New** – Click the New button to create a new zip code assignment for a CCC or NAPS Laboratory. (See **FIGURE 3**)

   b. **Update** – Select the radio button next to an entry in the Zip Code Assignments grid, and click the Update button to change an existing assignment. (See **FIGURE 3**)

   c. **Delete** – Select the radio button next to an entry in the grid, and click the Delete button to delete an existing assignment.

Assign CCC/Lab (continued)

FIGURE 3

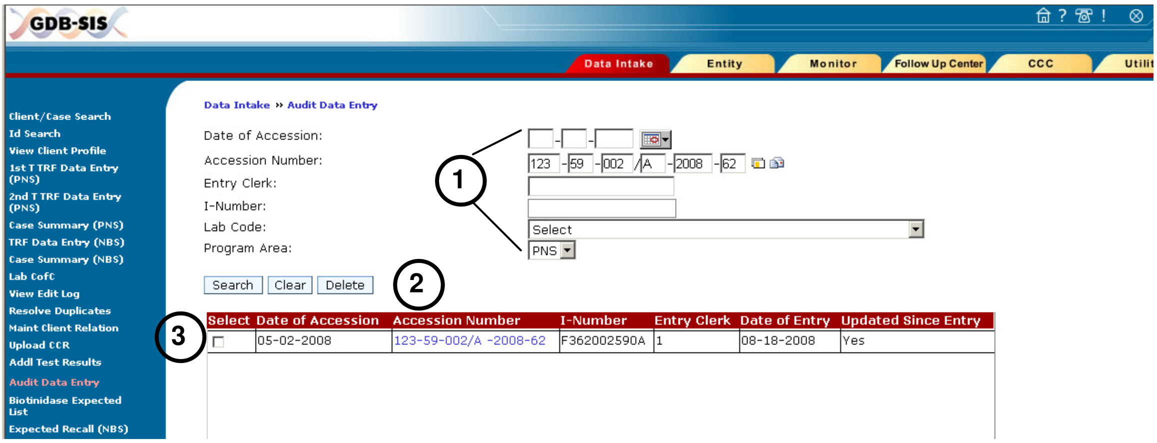


6. **Assign Zip Code** fields. Add new or update existing zip code assignment information for the selected CCC or NAPS Laboratory. **Entity Type**, **CCC/NAPS Lab Code**, and **Zip Code From** are all required fields.
   - ➢ If you enter only a **Zip Code From**, the **Zip Code To** field will be populated with the same zip code.
7. **Buttons**:
   a. **Save** – Saves new or updated assignments.
   b. **Cancel** – Returns you to the search function.
   c. **Clear** – Clears all entered data fields.

Audit Data Entry

Data Intake >> Audit Data Entry

This screen allows you to locate and edit TRF data that has been entered into SIS in one of two ways: 1) scanned using Optical Character Recognition, or 2) directly entered into SIS. TRF data that has been successfully saved can be edited regardless of entry method.



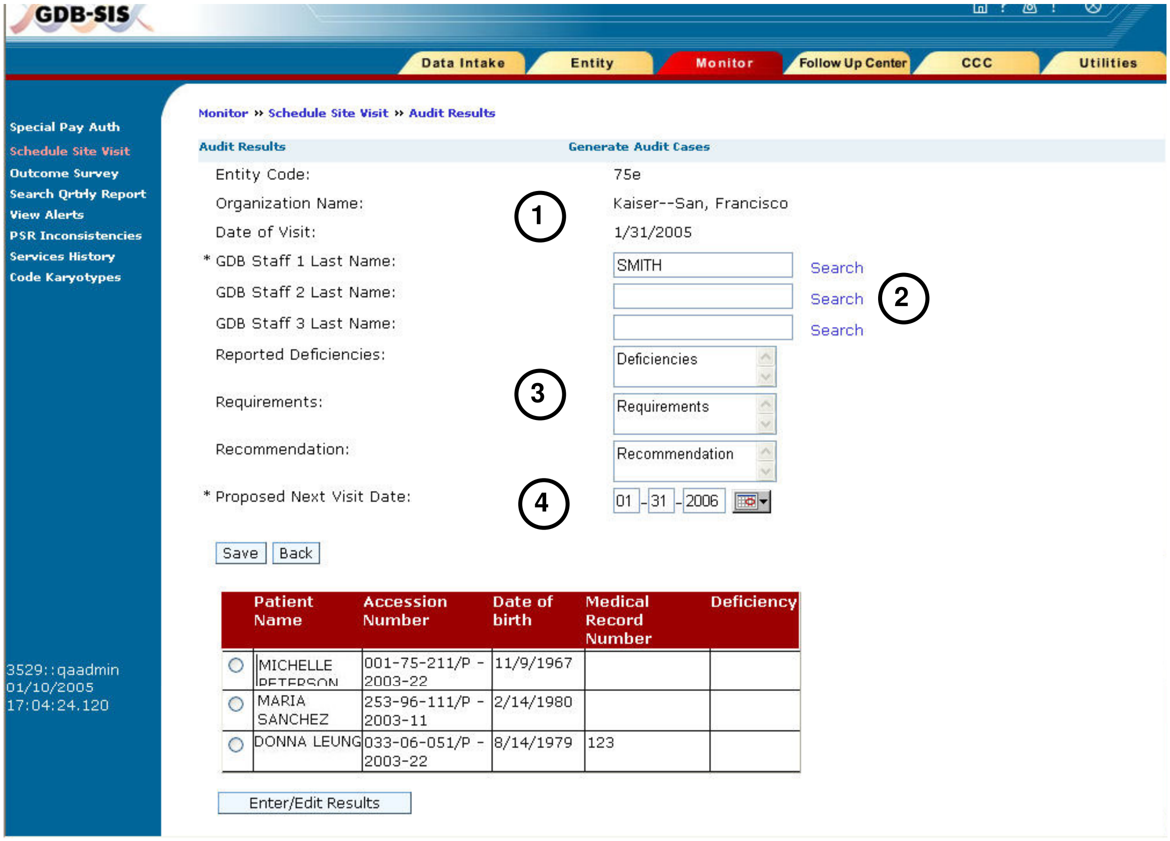
1. Search Criteria – Enter the search criteria to locate the TRF you would like to edit. You must correctly select PNS or NBS in the Program Area dropdown.
2. **Buttons**:
   a. **Search** - Returns TRFs that match the criteria you have entered (Search results exclude the TRFs which have been processed into SIS after the 8:00pm cutoff. You can navigate to other pages by clicking the page numbers below the results grid.
   b. **Clear** – Clears all entered search criteria.
   c. **Delete** – Updates the process status to ‘X’ for specified accession number.
3. Accession Number grid – Click on the Accession Number link to display the TRF to make changes and save them.
   a. After clicking the Accession Number link, the Audit Data Entry screen is displayed as an exact replica of the TRF Data Entry (PNS) or TRF Data Entry (NBS) screens. Please refer to the descriptions of these screens for additional information.
   b. Use caution when making changes to TRF data from the Audit Data Entry screen, as these changes will replace existing TRF information in SIS

Audit Results

Monitor >> Schedule Site Visits >> Audit Results

The **Audit Results** screen is used to record the results and findings of a follow up center site visit after the visit has occurred.

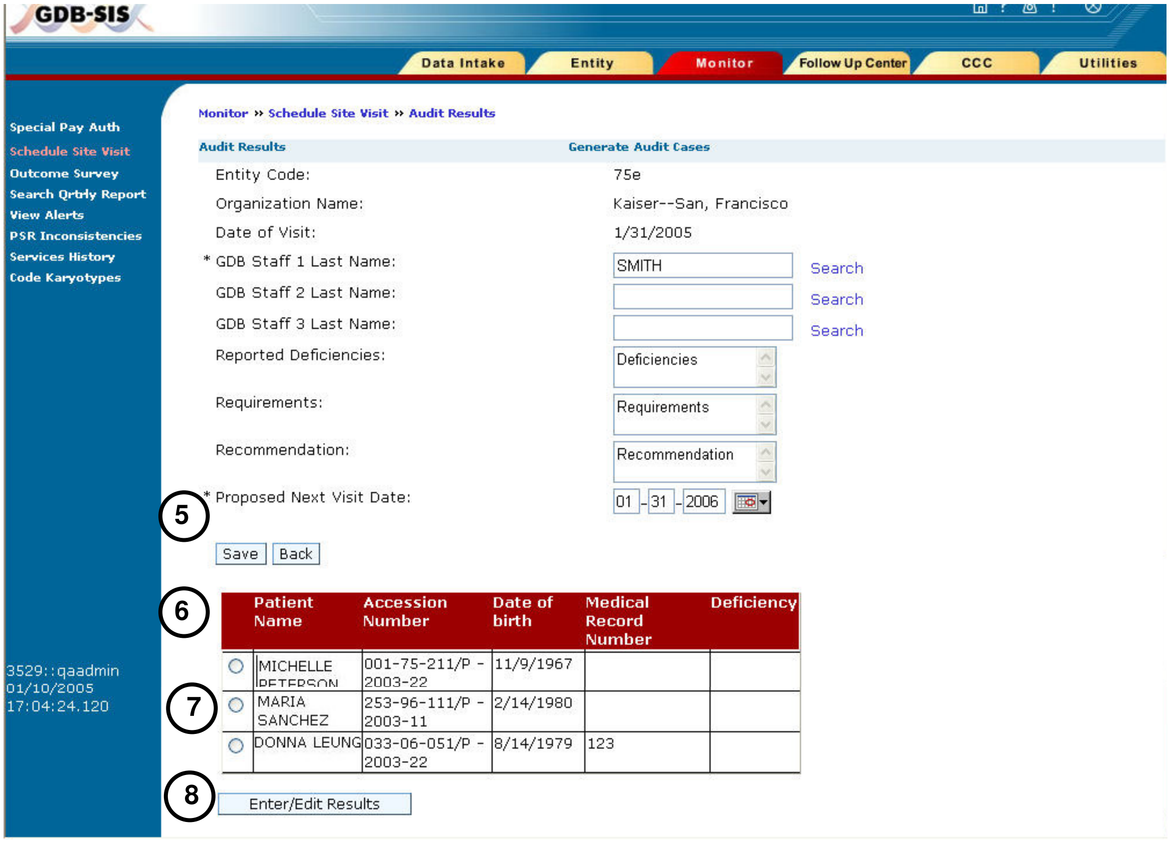
FIGURE 1



1. Information about the site visit, including the **Entity Code, Organization Name,** and **Date of Visit** is displayed in a read-only format, based on the information entered on the Schedule Site Visit screen.
2. **GDB Staff (1-3) Last Name** fields are read-only. You must click the Search links next to the fields to search for the name(s) of the GDB Staff member(s) who attended the site visit. **GDB Staff 1 Last Name** is a required field. The last names of up to three GDB Staff members who attended the site visit can be recorded.
3. Enter information about the site visit in the fields provided.
4. Based on the results of the site visit, enter the **Proposed Next Visit Date**. This is a required field.

Audit Results (continued)

FIGURE 2



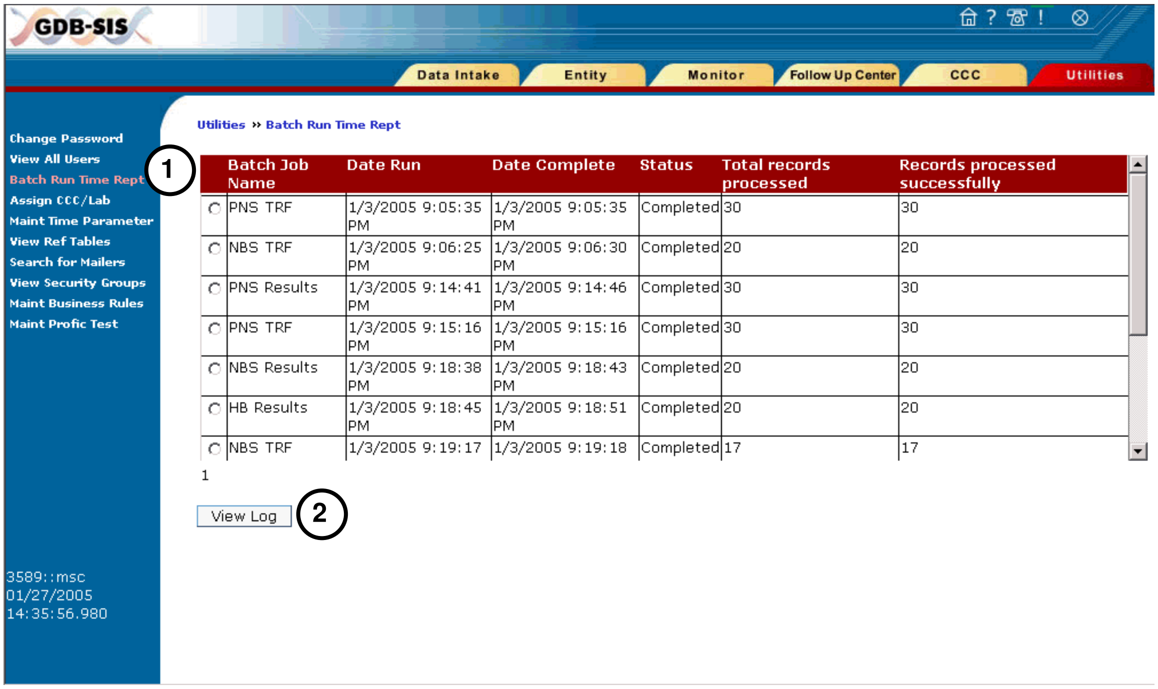
5. **Buttons:**
    a. Click the **Save** button to save the audit results you have entered.
    b. Click the **Back** button to return to the Schedule Site Visit screen, discarding any unsaved changes.
6. Client/case grid displays the cases that were specified for auditing during the visit.
7. To record case audit results about specific cases that were audited during the site visit, click the radio button next to the **Patient Name** in the client/case grid to select it for editing.
8. **Button**: After selecting a patient's name, click the **Enter/Edit Results** button to navigate to the Case Audit Results for the selected client case.

Batch Run Time Report

Utilities >> Batch Run Time Rept

This screen displays the logs of scheduled batch jobs that have run. A queue of 14 days worth of batch job logs are stored at any given time and are displayed as individual records in the grid.

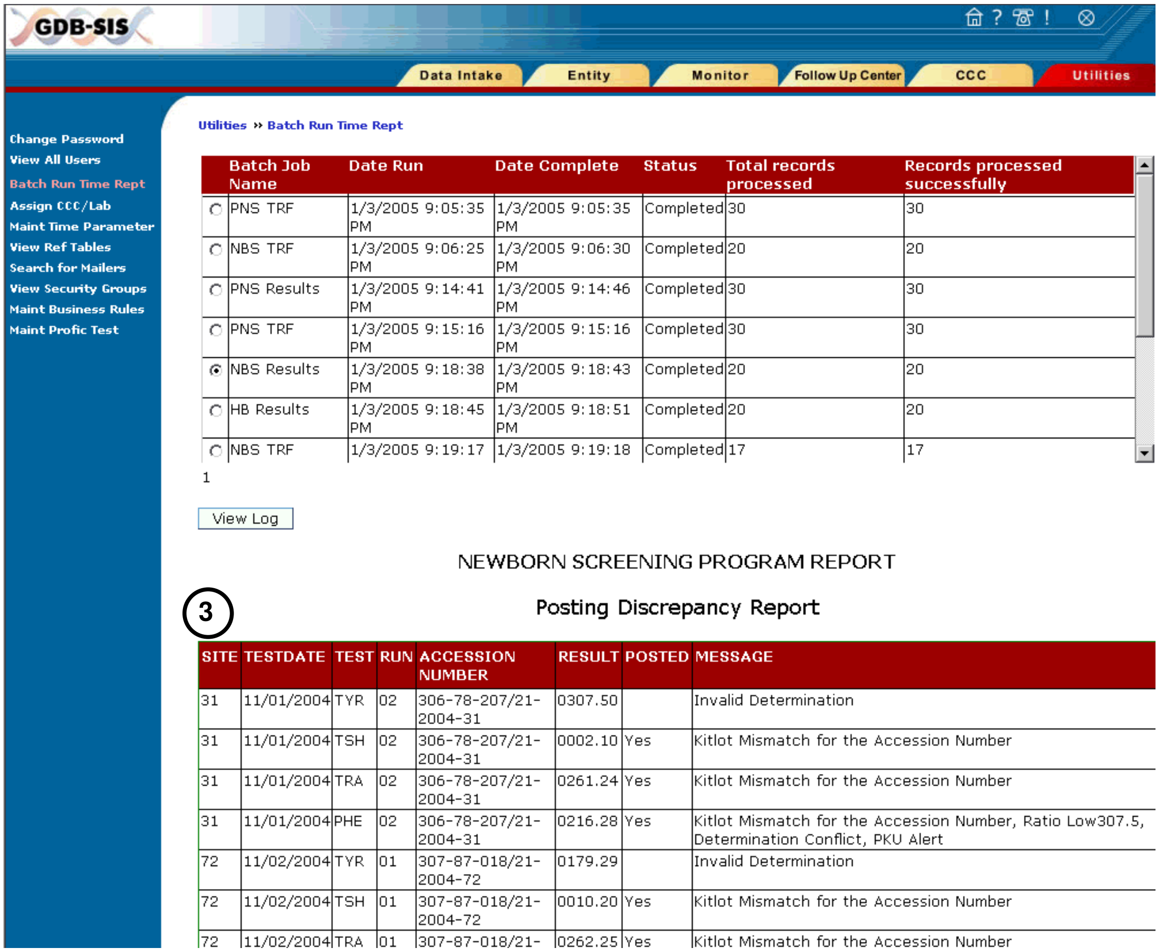
FIGURE 1



1. Select the report log you would like to view using the radio button on the record.
2. **Buttons:**
    a. **View Log** – Displays the log for the selected report.

Batch Run Time Report (continued)

FIGURE 2



Batch Job Name	Date Run	Date Complete	Status	Total records processed	Records processed successfully
PNS TRF	1/3/2005 9:05:35 PM	1/3/2005 9:05:35 PM	Completed	30	30
NBS TRF	1/3/2005 9:06:25 PM	1/3/2005 9:06:30 PM	Completed	20	20
PNS Results	1/3/2005 9:14:41 PM	1/3/2005 9:14:46 PM	Completed	30	30
PNS TRF	1/3/2005 9:15:16 PM	1/3/2005 9:15:16 PM	Completed	30	30
NBS Results	1/3/2005 9:18:38 PM	1/3/2005 9:18:43 PM	Completed	20	20
HB Results	1/3/2005 9:18:45 PM	1/3/2005 9:18:51 PM	Completed	20	20
NBS TRF	1/3/2005 9:19:17	1/3/2005 9:19:18	Completed	17	17

SITE	TESTDATE	TEST	RUN	ACCESSION NUMBER	RESULT	POSTED	MESSAGE
31	11/01/2004	TYR	02	306-78-207/21-2004-31	0307.50		Invalid Determination
31	11/01/2004	TSH	02	306-78-207/21-2004-31	0002.10	Yes	Kitlot Mismatch for the Accession Number
31	11/01/2004	TRA	02	306-78-207/21-2004-31	0261.24	Yes	Kitlot Mismatch for the Accession Number
31	11/01/2004	PHE	02	306-78-207/21-2004-31	0216.28	Yes	Kitlot Mismatch for the Accession Number, Ratio Low307.5, Determination Conflict, PKU Alert
72	11/02/2004	TYR	01	307-87-018/21-2004-72	0179.29		Invalid Determination
72	11/02/2004	TSH	01	307-87-018/21-2004-72	0010.20	Yes	Kitlot Mismatch for the Accession Number
72	11/02/2004	TRA	01	307-87-018/21-	0262.25	Yes	Kitlot Mismatch for the Accession Number

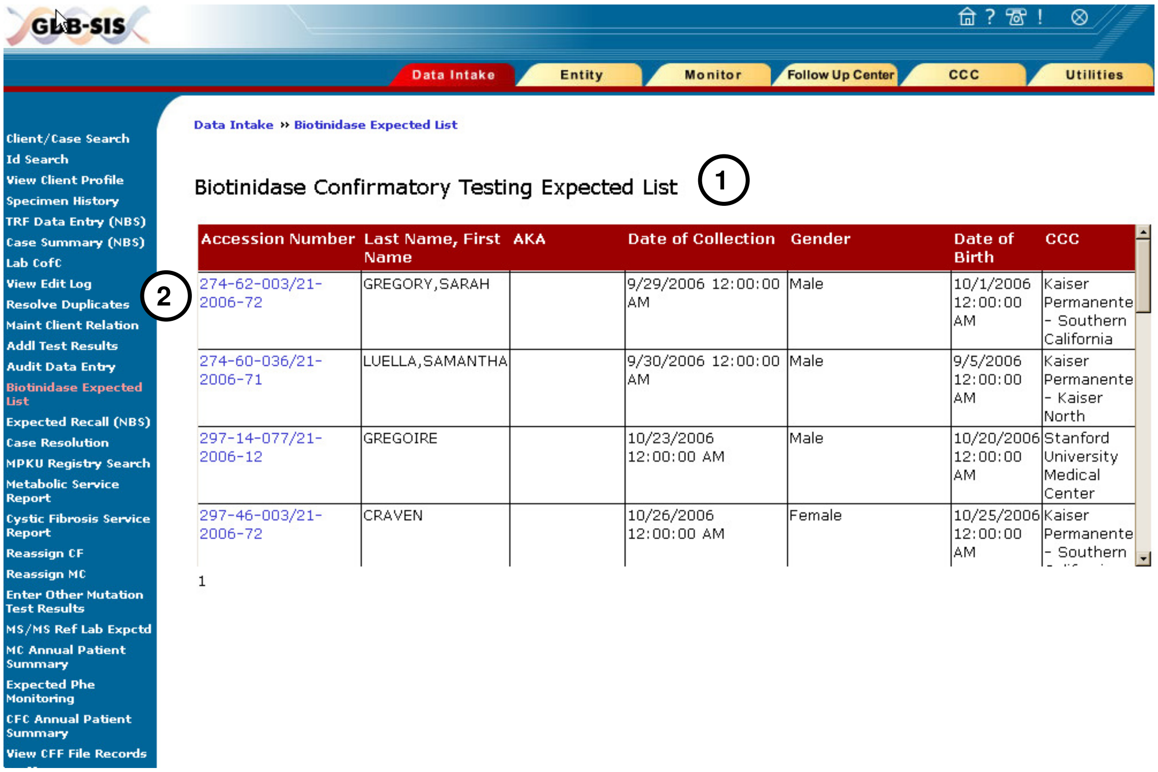
3. The selected log is displayed below the main data grid.

Biotinidase Confirmatory Testing Expected List

Data Intake >> Biotinidase Expected List

This screen lists all cases with positive Biotinidase Deficiency screening test results. The cases remain on the list until they are resolved by the CCC.

FIGURE 1

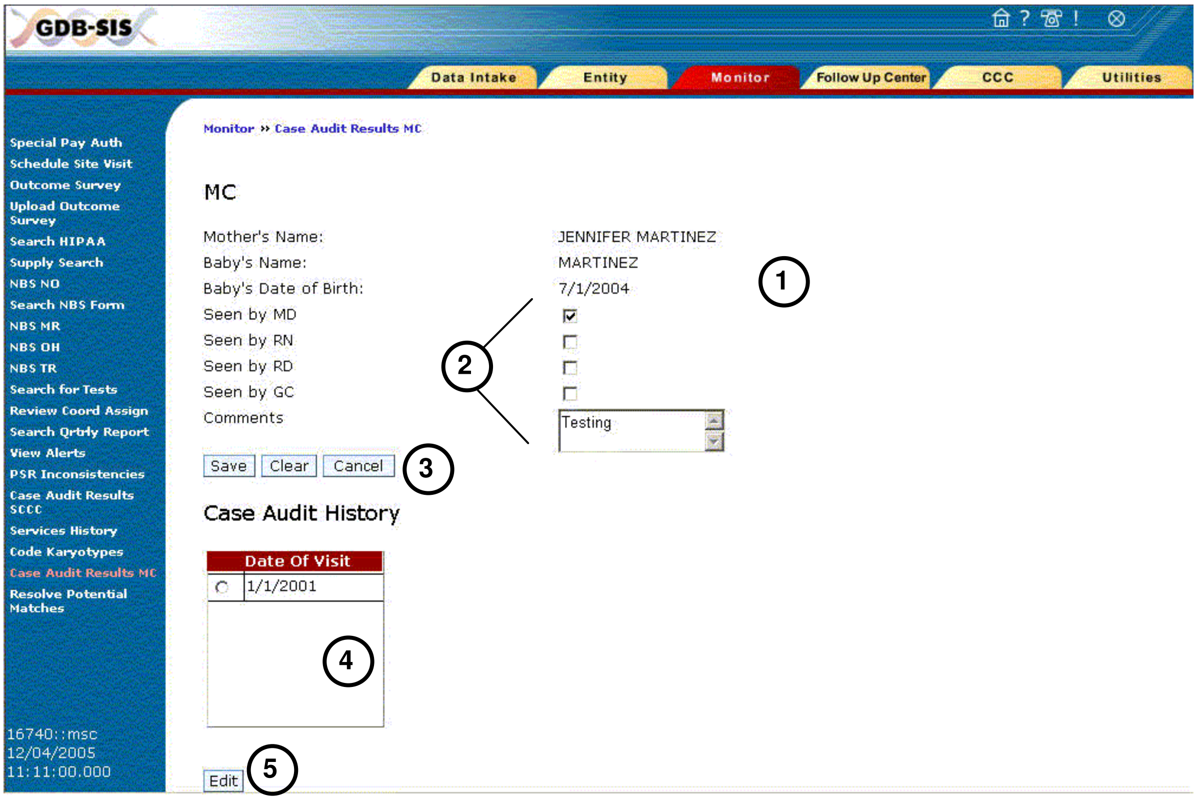


1. **Biotinidase Confirmatory Testing Expected List:** Displays all cases with a positive biotinidase deficiency determination until they are resolved by the CCC.
2. Click the appropriate **Accession Number** hyperlink on the grid to enter confirmatory test results for a specific case.

Case Audit Results MC (Metabolic Center)

Monitor >> Case Audit Results MC

The **Case Audit Results MC** screen is used to record audit results for a particular case at a Metabolic Center that was audited during a site visit. To access this screen, click on the Enter/Edit Results button from the Audit Results screen.



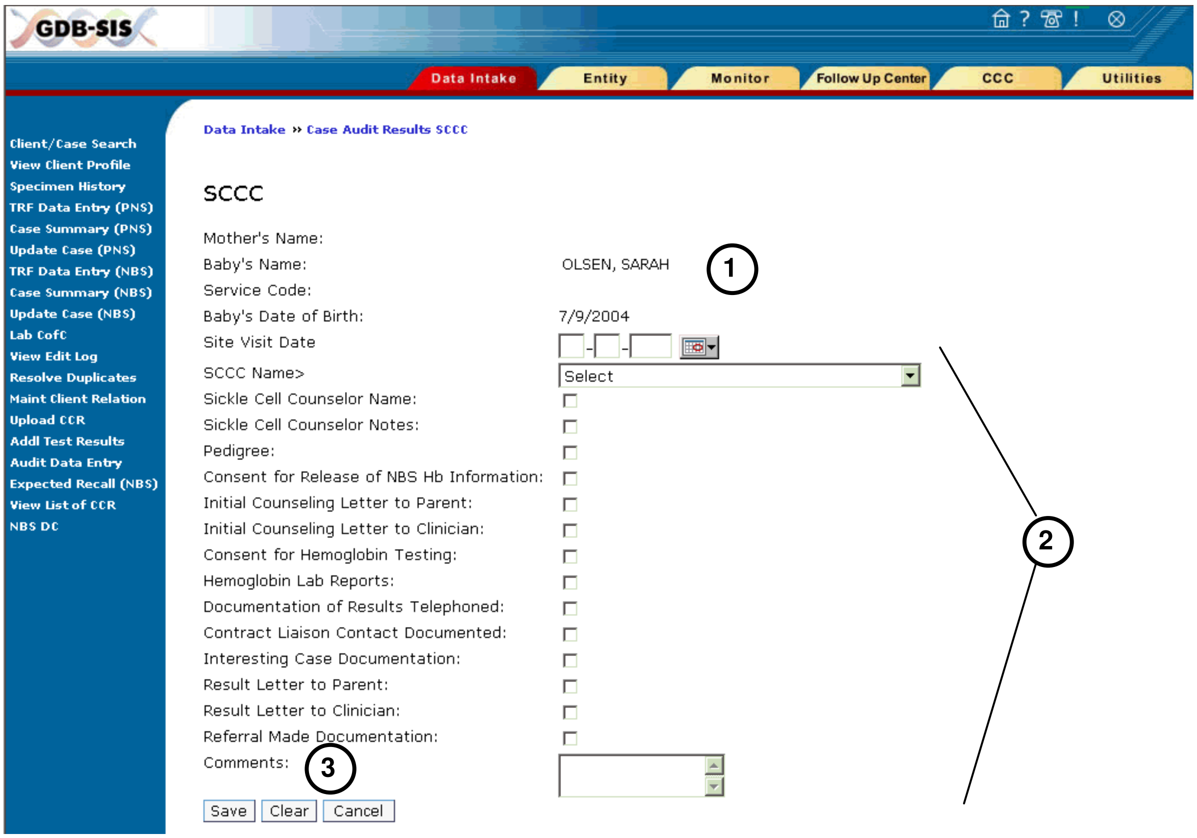
1. The Mother name and baby name are displayed in a read only format based on the selected case.
2. Enter information about the case audit in the fields provided.
3. **Buttons**:
    a. **Save** – Saves the case audit information you have entered/modified.
    b. **Clear** – Clears the case audit information, discarding any changes without saving.
    c. **Cancel** – Click to return to the **Audit Results** screen, discarding changes
4. All audits that have been saved for the case are displayed in the **Case Audit History** grid. Click the radio button next to the **Date of Visit** to select that audit date for editing.
5. Click the **Edit** button to edit the case audit results for the selected site visit date.

Case Audit Results SCCC (Sickle Cell Counseling Center)

Data Intake >> Case Audit Results SCCC

The **Case Audit Results SCCC** screen is used to record audit results for a particular case at a Sickle Cell Counseling Center that was audited during a site visit. To access this screen, use the 3rd level link 'Case Audit Results SCCC' in the Data Intake module.

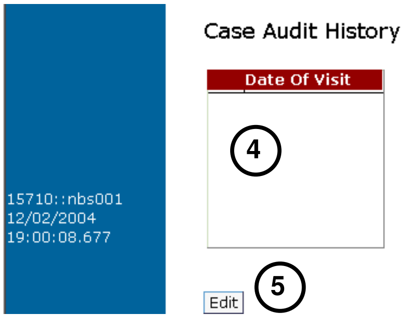
FIGURE 1



1. The **Mother's Name** and the **Baby's Name** are displayed in read-only format at the top of the screen.
2. Enter information about the case audit in the fields provided.
3. **Buttons**:
    a. Click the **Save** button to save the case audit information you have entered. A new row will be added to the Case Audit History grid.
    b. Click the **Clear** button to clear the case audit information, discarding any unsaved information.
    c. Click the **Cancel** button to return to the **NBS Case Summary** screen, discarding any unsaved data.

Case Audit Results SCCC (Sickle Cell Counseling Center) (continued)

FIGURE 2



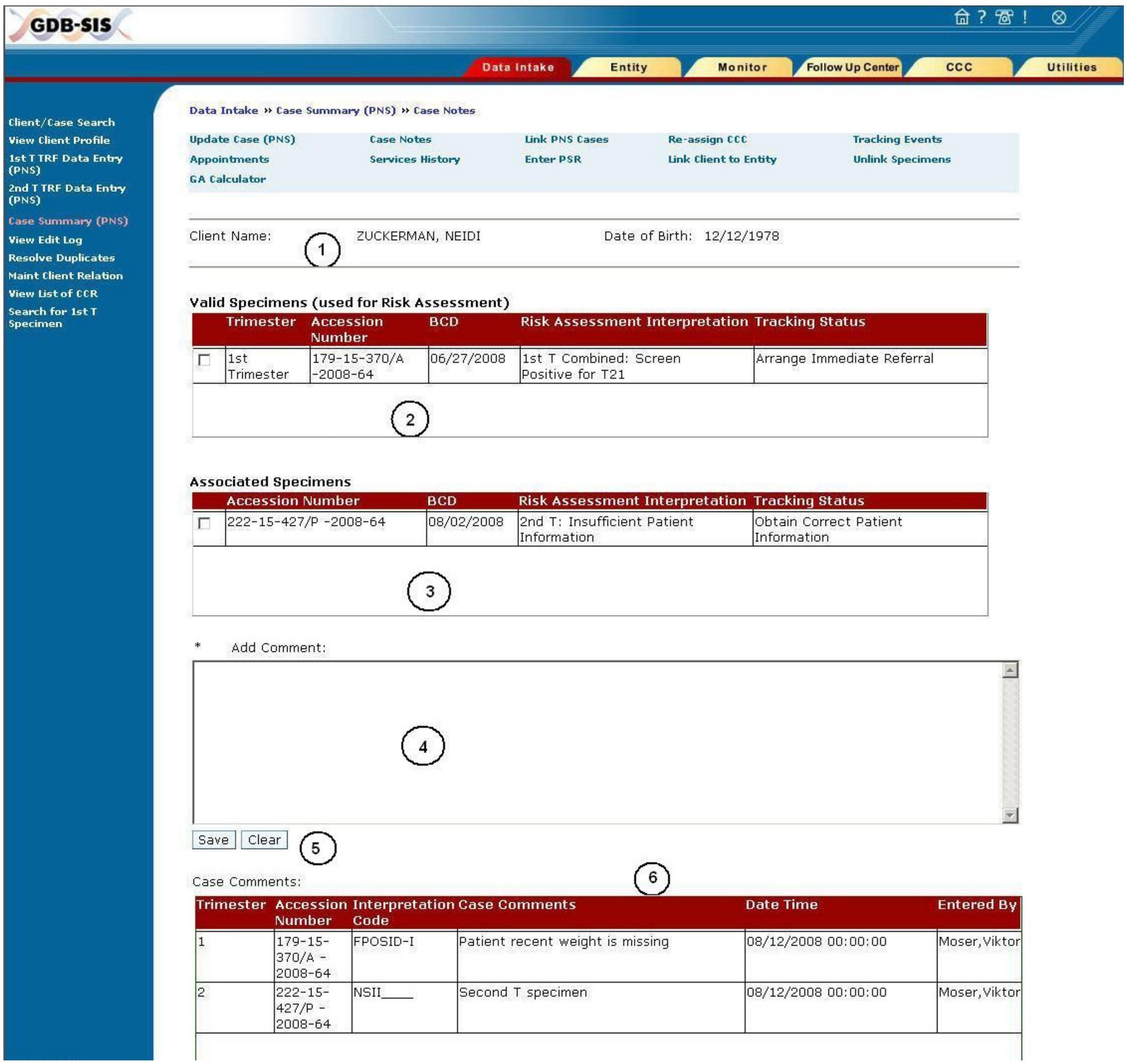
4. All audits that have been saved for the case are displayed in the **Case Audit History** grid. Click the radio button next to the Date of Visit to select that audit date for editing.
5. Click the **Edit** button to edit the case audit results for the selected site visit date.

Case Notes

The **Case Notes** screen is used by Case Coordinators to retain and track comments relevant to a case. In addition, comments are added to the case automatically from comments on the update case screen. All comments for the case are available on the **Case Notes** screen.

Post PEII PNS Case Notes

Data Intake >> Case Summary (PNS) >> Case Notes



Post PEII PNS Case Notes (continued)

1. Client information is displayed in a read-only format, based on the client profile.
2. **Valid Specimens** grid displays all the valid specimens related to the case.
3. **Associated Specimens** grid displays all the associated specimens related to the case.
4. Enter comments to add to the case in the **Add Comment** field. Comments can be copied and pasted into the **Add Comment** field.
5. **Buttons:**
    a. **Save** – Select the check box corresponding to the specimen for which the case notes need to be added, Click to save the comments. Once comments are saved, text entered will be moved from the Add Comment box to a new row in the Case Comments grid (see #4 below).
    b. **Clear** – Clears all text in the **Add Comment** field, discarding any unsaved data.
6. Each time you save a new comments record, a row will be added to the **Case Comments** grid to display the comments. When comments are saved SIS adds the Trimester, Accession Number, Interpretation Code, Case Comments, User Name, date and time stamp.

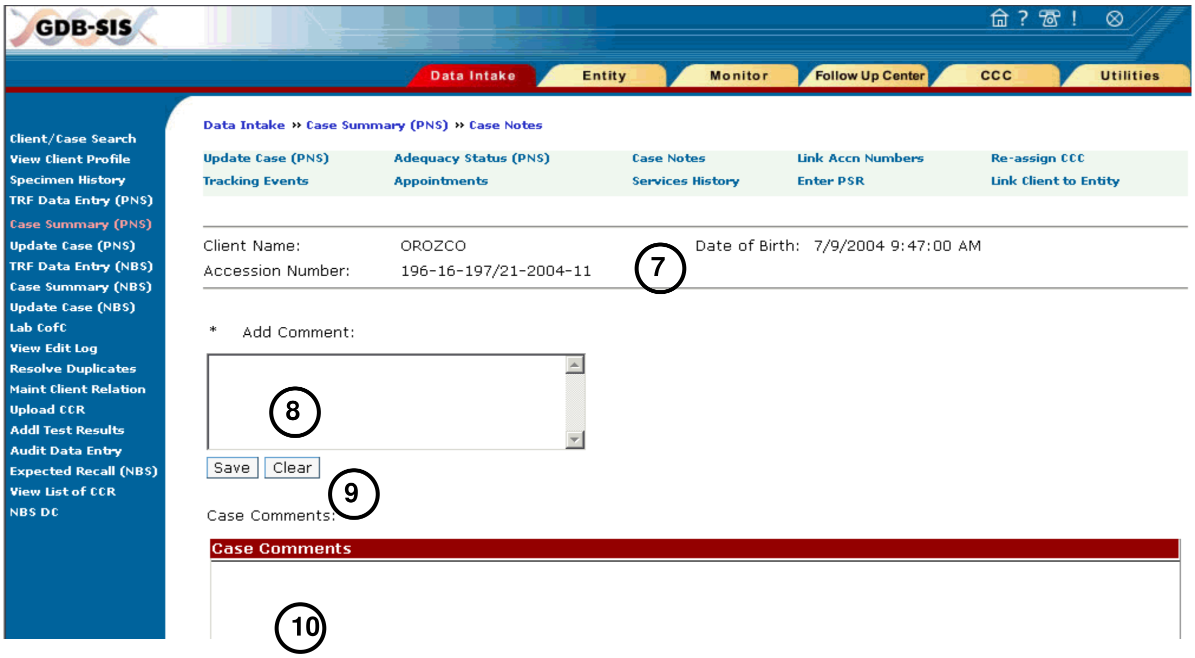
Pre PEII and NBS Case Notes

Data Intake >> Case Summary (PNS) >> Case Notes

OR

Data Intake >> Case Summary (NBS) >> Case Notes

The **Case Notes** screen is used by Case Coordinators to retain and track comments relevant to a case. In addition, comments are added to the case automatically from comments on the update case screen. All comments for the case are available on the **Case Notes** screen.



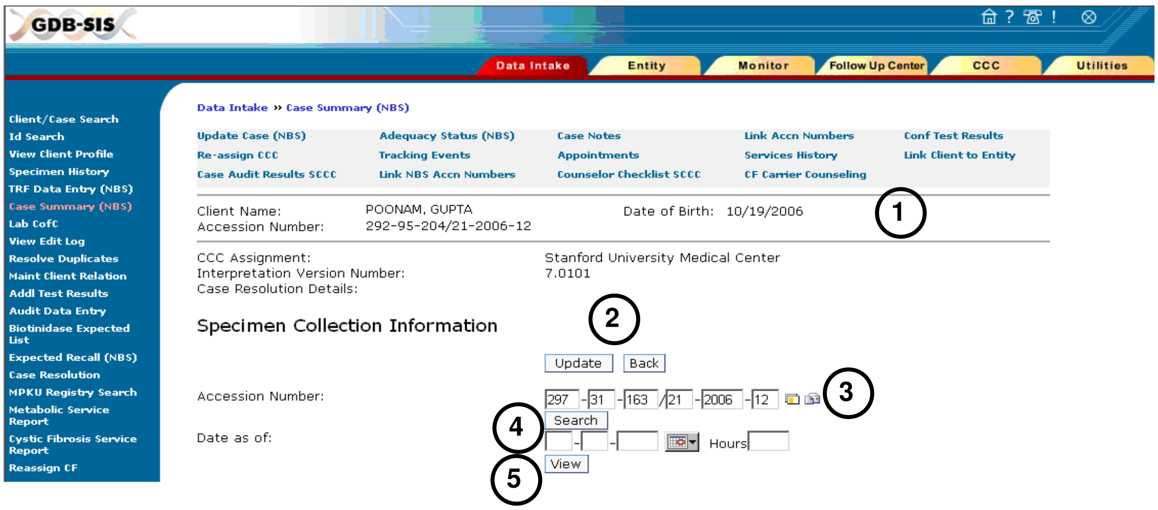
7. Client information is displayed in a read-only format, based on the client profile.
8. Enter comments to add to the case in the **Add Comment** field. Comments can be copied and pasted into the **Add Comment** field.
9. **Buttons:**
    a. **Save** – Click to save the comments. Once comments are saved, text entered will be moved from the Add Comment box to a new row in the Case Comments grid (see #4 below).
    b. **Clear** – Clears all text in the **Add Comment** field, discarding any unsaved data.
10. Each time you save a new comments record, a row will be added to the **Case Comments** grid to display the comments. When comments are saved SIS adds the user name, date and time stamp.

Case Summary (NBS)

Data Intake >> Case Summary (NBS)

This screen is used to display the case summary for newborn screening cases. Information displayed on this screen includes specimen collection information, mother and clinician information, related cases and summary of the test results.

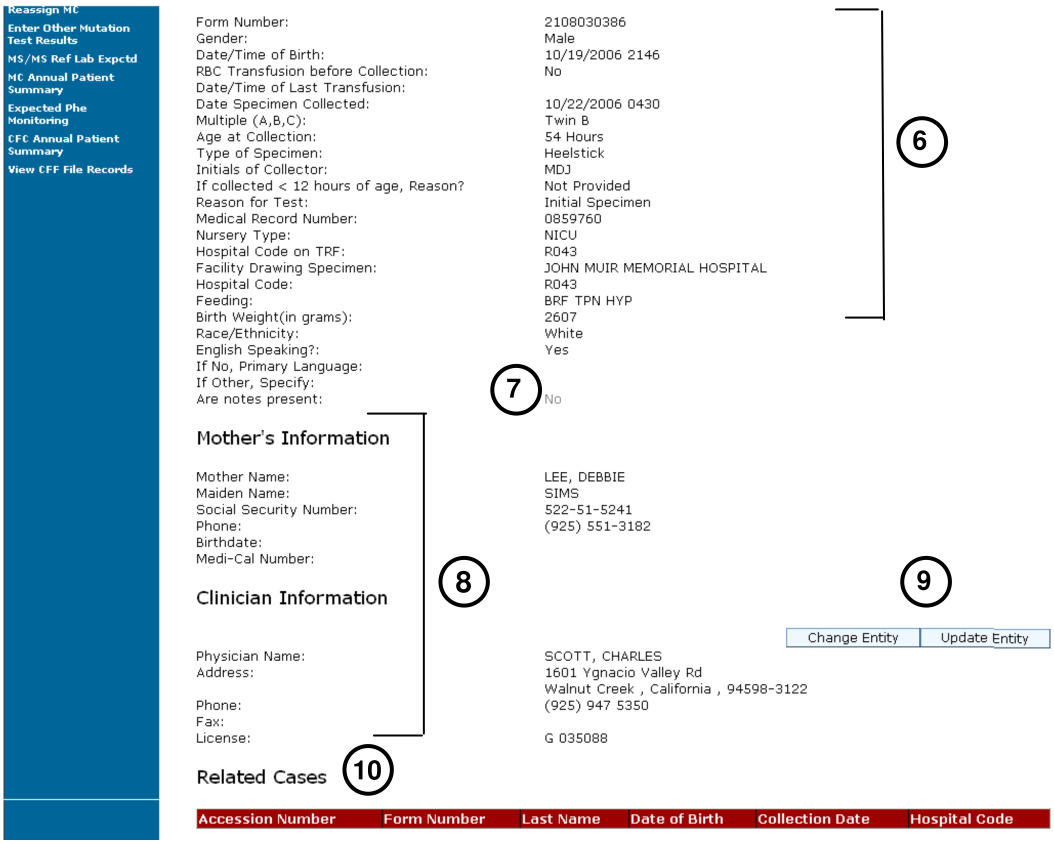
FIGURE 1



1. This section will display the current **CCC Assignment**, **Interpretation Version Number** and the **Case Resolution Details**.
2. Buttons:
   a. **Update:** Click the **Update** button to navigate to the Update Case (NBS) screen where you can modify case information.
   b. **Back:** Click the **Back** button to return to the previous page without saving.
3. The user can enter a new accession number to view the Case Summary for a different accession number.
4. The **Search** button below the accession number will allow the user to go to the Client Case Search screen and search for another case and return that accession number to this screen.
5. The **Date as of** field displays data at a given point in time. Users are able to enter a different date-time in this field to view a different snapshot of data by entering the new date and clicking the **View** button.

Case Summary (NBS) - (continued)

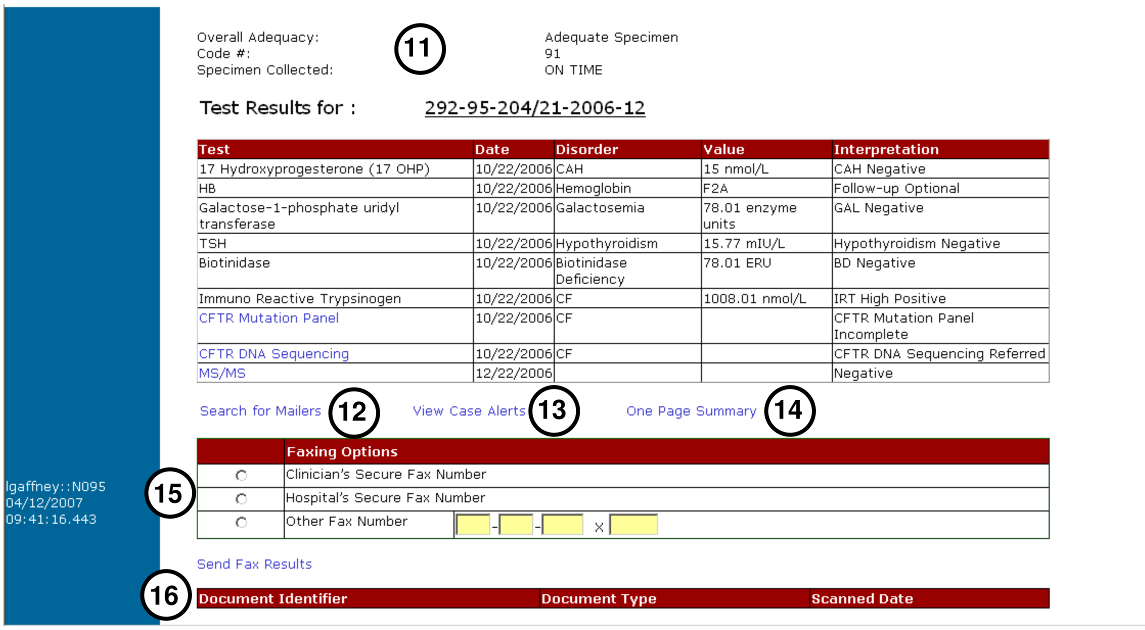
FIGURE 2



6. This area of the screen contains TRF information.
7. The screen displays a case notes indicator with a link to navigate to the Case Notes screen, if any notes are present for the case.
8. **Mother's Information and Clinician Information:** These areas include information populated from the current Client Profile screen.
9. **Buttons:**
   a. **Change Entity:** This button re-directs the user to the Link Client to Entity screen to change an entity.
   b. **Update Entity:** This button re-directs the user to the Entity Profile where information is updated.
10. **Related Cases** grid: This grid displays the cases which are linked to the current case. A hyperlink in this grid will allow the user to access the Case Summary details for a selected case.

Case Summary (NBS) - (continued)

FIGURE 3



Overall Adequacy: Adequate Specimen
Code #: 91
Specimen Collected: ON TIME

Test Results for : 292-95-204/21-2006-12

Test	Date	Disorder	Value	Interpretation
17 Hydroxyprogesterone (17 OHP)	10/22/2006	CAH	15 nmol/L	CAH Negative
HB	10/22/2006	Hemoglobin	F2A	Follow-up Optional
Galactose-1-phosphate uridyl transferase	10/22/2006	Galactosemia	78.01 enzyme units	GAL Negative
TSH	10/22/2006	Hypothyroidism	15.77 mIU/L	Hypothyroidism Negative
Biotinidase	10/22/2006	Biotinidase Deficiency	78.01 ERU	BD Negative
Immuno Reactive Trypsinogen	10/22/2006	CF	1008.01 nmol/L	IRT High Positive
CFTR Mutation Panel	10/22/2006	CF		CFTR Mutation Panel Incomplete
CFTR DNA Sequencing	10/22/2006	CF		CFTR DNA Sequencing Referred
MS/MS	12/22/2006			Negative

Search for Mailers 12 View Case Alerts 13 One Page Summary 14

	Faxing Options
○	Clinician's Secure Fax Number
○	Hospital's Secure Fax Number
○	Other Fax Number ___-___-___ x ___

lgaffney::N095
04/12/2007
09:41:16.443

Send Fax Results

Document Identifier	Document Type	Scanned Date

11. The **Test Results For** grid displays results for NBS tests. The CFTR mutation panel and CFTR DNA sequencing panel data will only be displayed if these tests are required based on IRT results.

    Note: If the specimen is marked inadequate, all tests will be given an "I" type inadequacy code. Test values will not appear on the Case Summary screen.

    A hyperlink re-directs the user to the MS/MS Test Results screen if the test displays an MS/MS test result, and the CF Test Results screen if the test displays a CFTR Mutation Analysis result or CFTR DNA Sequencing result.

12. **Search for Mailers:** A hyperlink re-directs user to the Search for Mailers page.

13. **View Case Alerts:** A hyperlink re-directs user to the Case Alerts page.

14. **One Page Summary:** The **One Page Summary** hyperlink will provide the user with information based on case summary details and current configuration of contact details. It opens a new window to the **One Page Summary** screen.

15. The **Faxing Options** grid sends fax results based on the user's choice of radio button.

    Faxing Options: There are three options for sending a fax. When **Send Fax Results** link is clicked, the results for that case will be sent to the clinician/hospital of record or other fax number specified on the Entity Telecom table as a "secure fax number". A warning will be generated if the fax number is not active or secured.

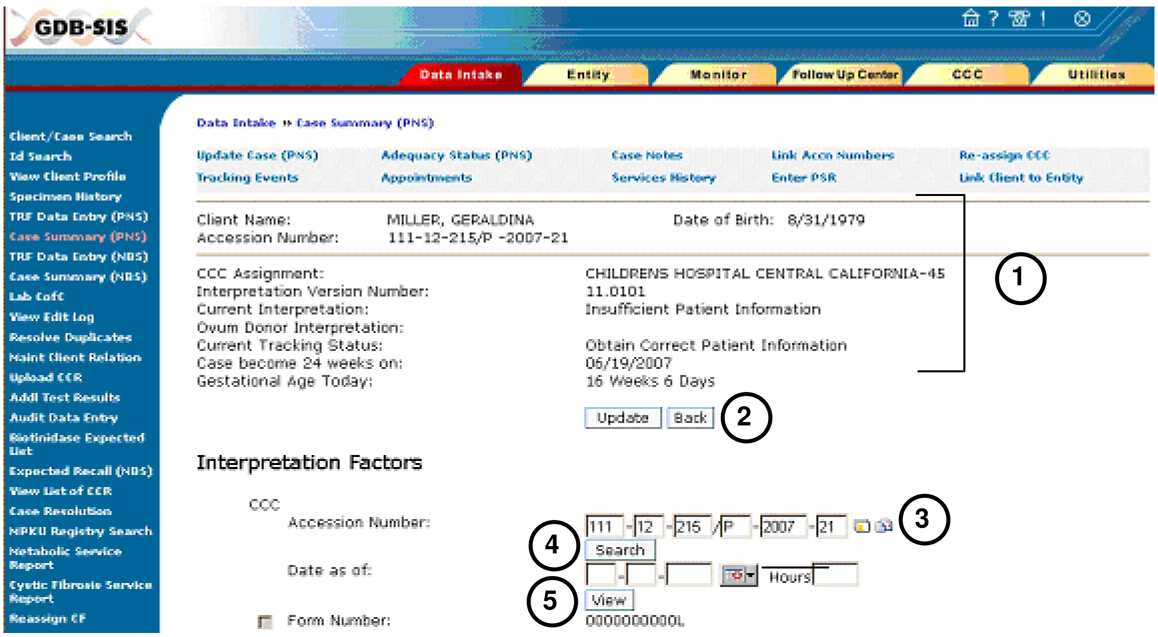
16. The linked images grid **(Document Identifier)** provides access to the image of the Test Request Form or other forms that are associated with the case.

Case Summary (PNS)

Data Intake >> Case Summary (PNS)
The **Case Summary (PNS)** screen is where you can view information about a prenatal case, including basic client information, current interpretation, current status of the case, interpretation factors, clinician information, and test results. If you wish to change any information on this screen, you must click the Update button (see #2 below) and make all of your changes from the Update Case (PNS) screen.

To get to the **Case Summary (PNS)** screen, you can click the Accession Number in the Headline Cases screen or you can use the Client/Case Search screen to locate an existing case. You can also navigate to the case summary screen from other pages like Cases Referred screens etc.

FIGURE 1

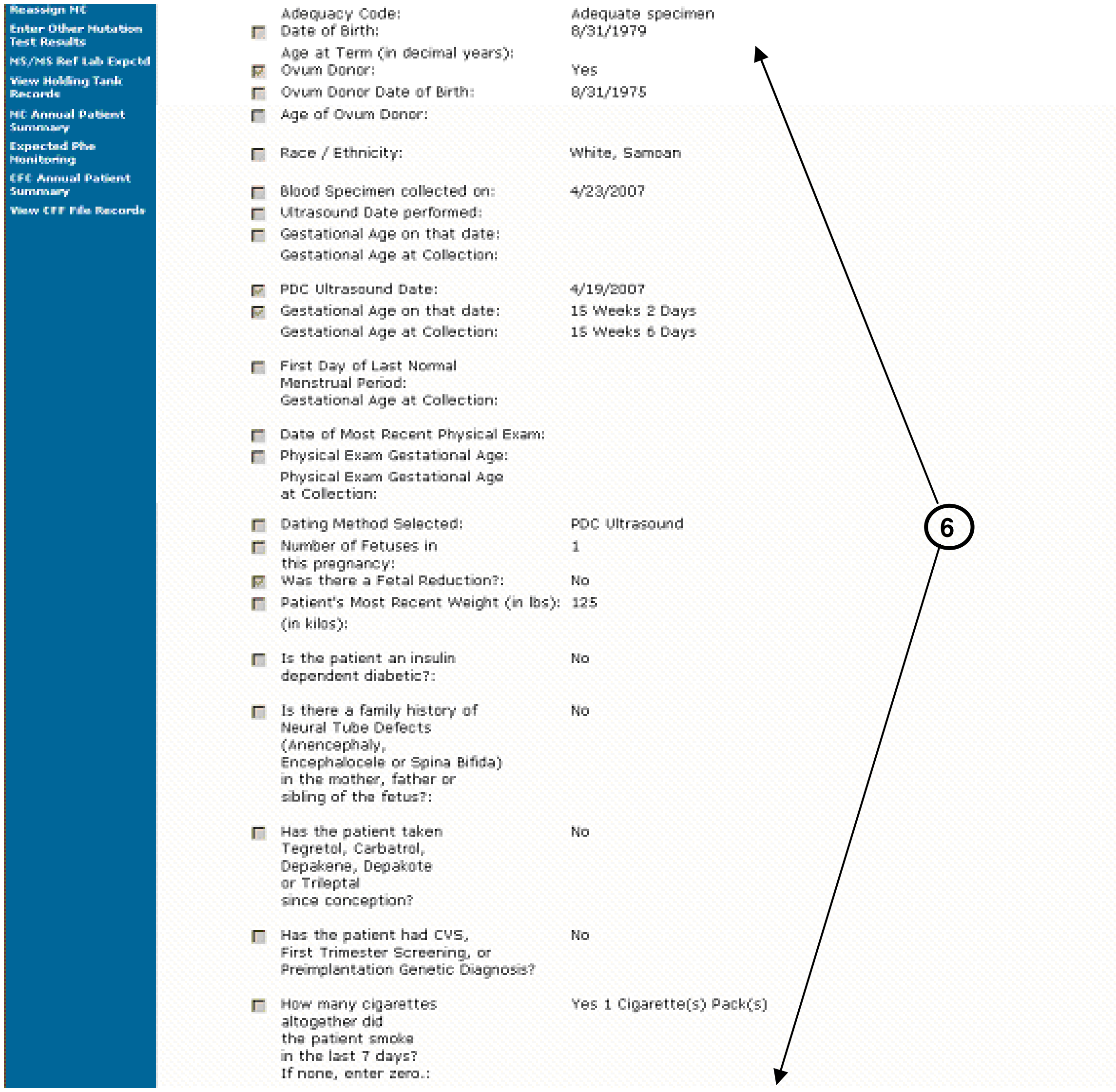


1. A summary of basic patient data is displayed in a read-only format, based on the client profile information. The current CCC assignment is displayed along with the version number and additional prenatal screening case information.
2. **Buttons:**
   a. **Update:** Click the **Update** button to navigate to the Update Case (NBS) screen where you can modify case information.
   b. **Back:** Click the **Back** button to return to the previous page without saving.
3. The user can enter a new accession number to view the Case Summary for a different accession number. Use the cut and paste icons on the right of the accession number field to automatically copy or paste the accession number.

4. The **Search** button link next to the accession number will allow the user to go to the Client Case Search screen and search for another case and return that accession ID to this screen.
5. **Date as of:** displays data at a given point in time. Users are able to enter a different date-time in the **View as of:** field to view a different snapshot of data. Enter the date and then click the **View** button below the date.

Case Summary (PNS) - (continued)

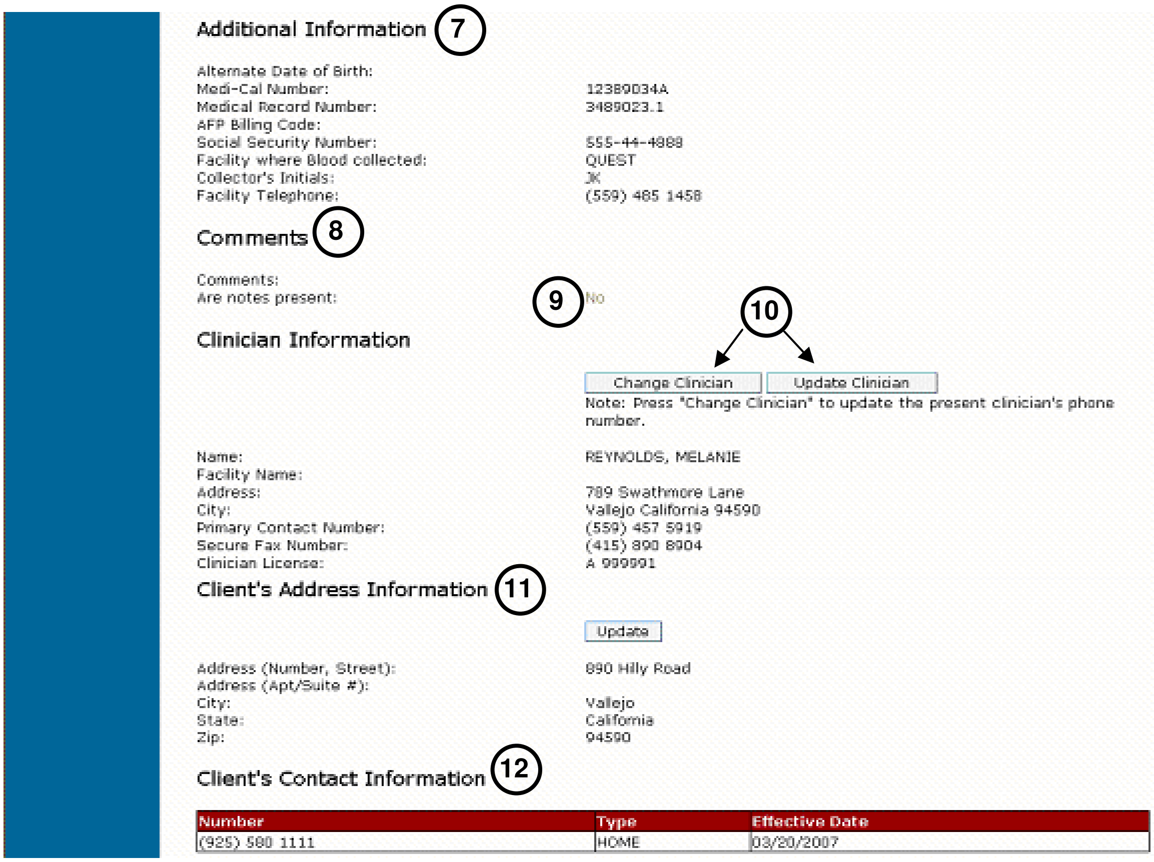
FIGURE 2



6. Interpretation factors are listed in a read-only format. If the interpretation factors have been verified and checked off on the Update Case (PNS) screen, the checkboxes will be filled.

Case Summary (PNS) - (continued)

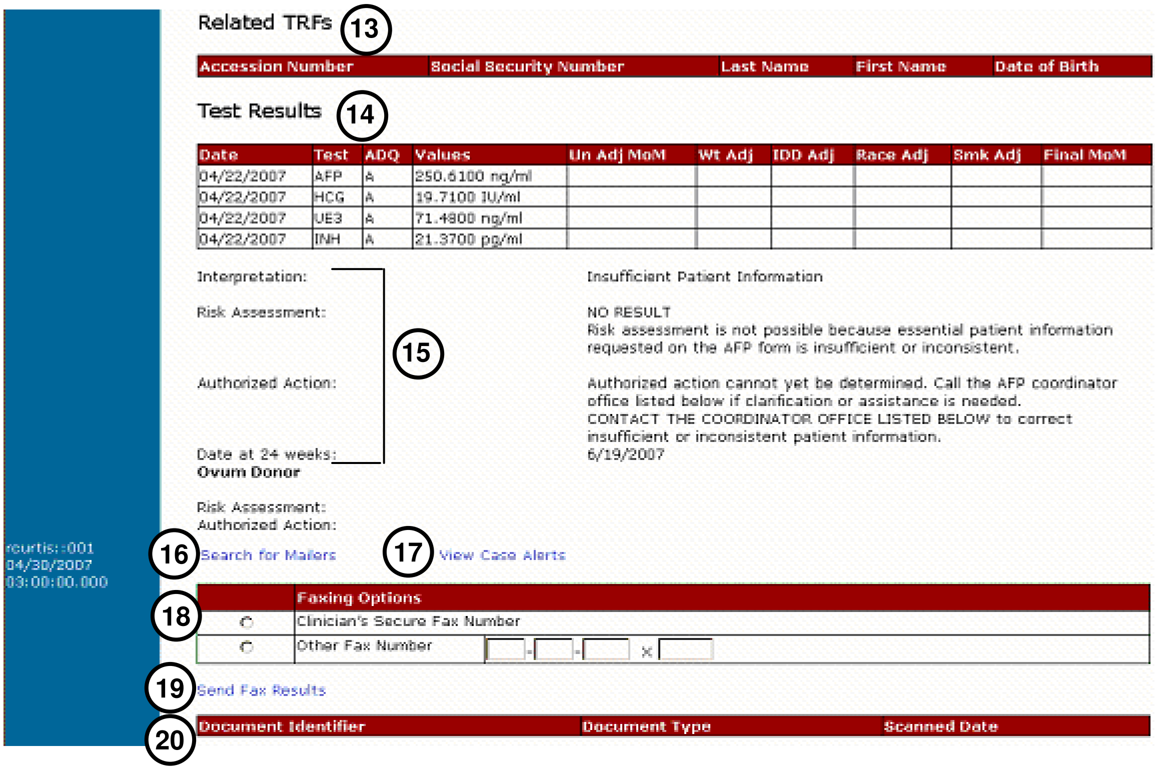
FIGURE 3



7. **Additional Information** section can be revised on the Update Case (PNS) screen.
8. **Comments** entered in the comments field on the Update Case (PNS) screen will be displayed here.
9. The screen displays a case notes indicator with a link to navigate to the Case Notes screen if any notes are present for the case.
10. **Buttons:**
    a. **Change Clinician:** Links the user to the Link Client to Entity screen, where user can input new clinician information.
    b. **Update Clinician:** Displays the Entity Profile Screen where the user can revise the current clinician's information.
11. **Client's Address Information** displays the current known address for the client. The **Update** button will display the Update Address screen where a new address can be added.
12. **Client's Contact Information** displays the phone number contact for the client. This can be updated on the Update Phone Numbers screen.

Case Summary (PNS) - (continued)

FIGURE 4



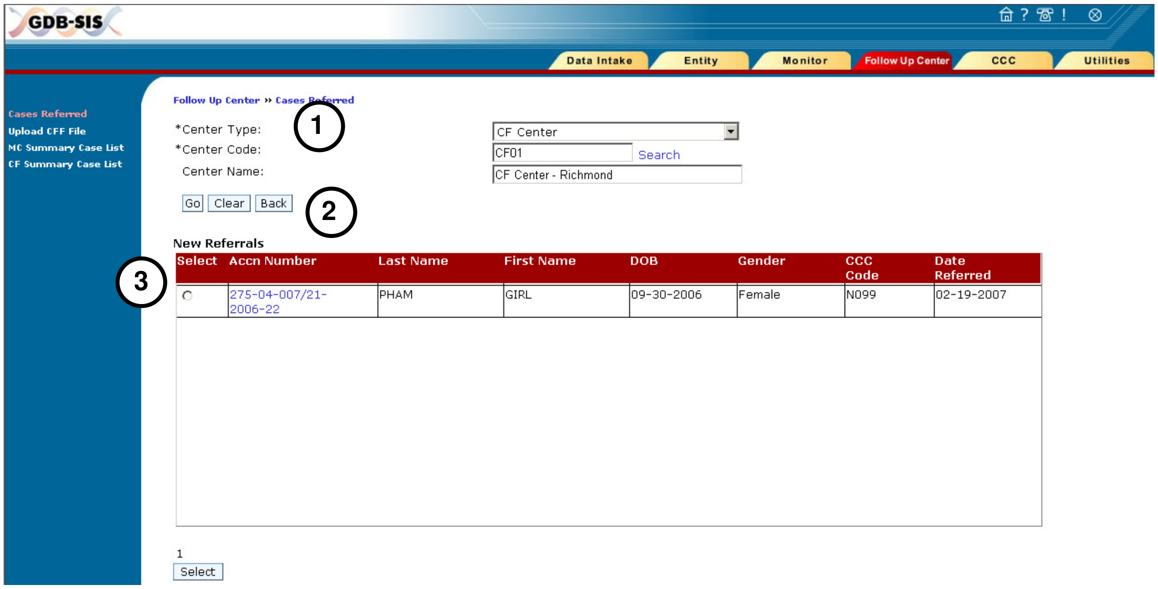
13. **Related TRFs:** This grid displays the cases, which are linked to the current case. A hyperlink in this grid will allow the user to access the Case Summary details for a selected case.
14. **Test Results:** Results for the case are displayed in read-only format.
15. Interpretation and associated information about the case is displayed.
16. **Search for Mailers:** Re-directs the user to the Search for Mailers screen.
17. **View Case Alerts:** Re-directs the user to the Case Alerts screen.
18. The **Faxing Options** grid sends fax results based on the user's selected choice of radio button
19. **Send Fax Results:** The results for a case will be sent to the clinician/hospital of record or other fax number specified on the Entity Telecom table as a "secure fax number". A warning will be generated if the fax number is not active or secured.
20. The linked images grid provides access to the image of the Test Request Form or other forms that are associated with the case.

Cases Referred – CF Center

Follow-Up Center >> Cases Referred

This screen will list cases referred to a specific CF Center (CFC) and allow the users to link to case information.

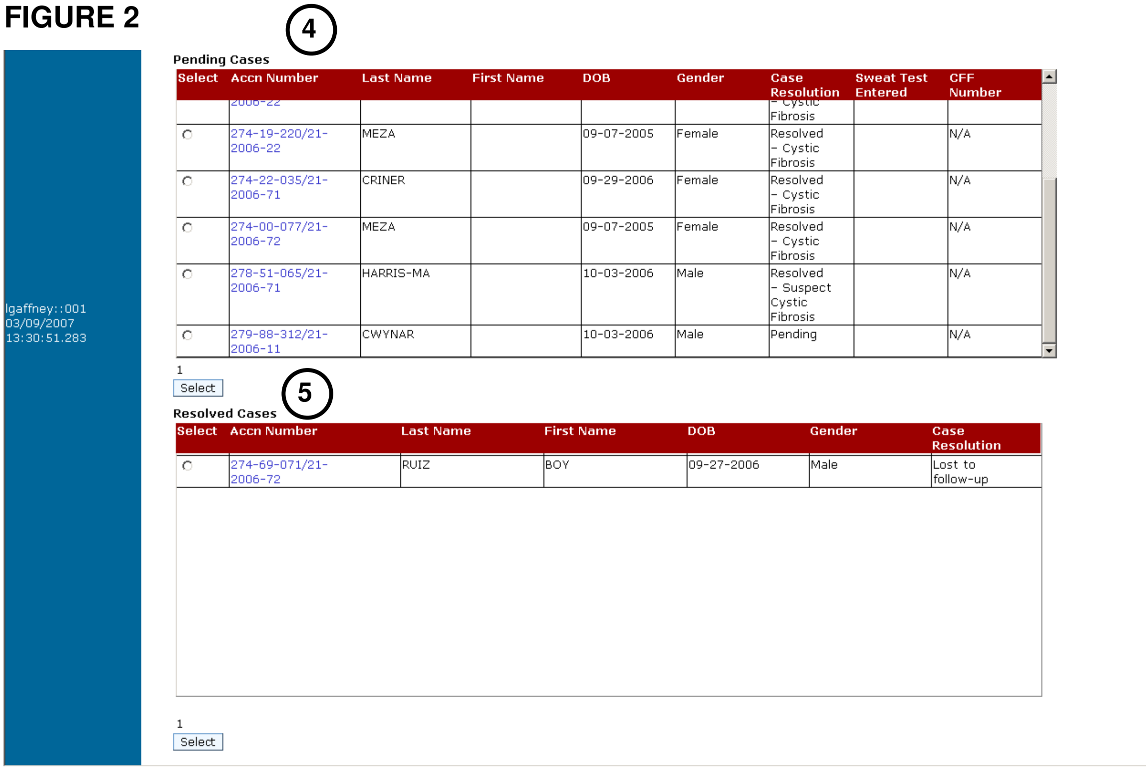
FIGURE 1



1. The **Center Type** and **Center Code** fields will be pre-populated in a read-only format based on your log-in information. They will either be read-only or editable depending on the security access enabled for the SIS user logging in.
2. **Buttons:**
   a. **Go:** Allows you to view cases referred to your follow-up center.
   b. **Clear:** Removes all information from the screen including **Center Type, Center Code**, and **Center Name** from the cases referred grid.
   c. **Back:** Displays the previous screen in SIS.
   d. **Select:** Advances to the next screen combined with the user selection of a radio button on a grid.
3. **New Referrals:** Displays all new cases referred to the CF Center by the Newborn Screening Area Service Center or new cases transferred from another CF Center or CF Carrier Counseling Center.

Cases Referred - CF Center (continued)

FIGURE 2



Pending Cases

Select	Accn Number	Last Name	First Name	DOB	Gender	Case Resolution	Sweat Test Entered	CFF Number
	2006-22					- Cystic Fibrosis		
○	274-19-220/21-2006-22	MEZA		09-07-2005	Female	Resolved - Cystic Fibrosis		N/A
○	274-22-035/21-2006-71	CRINER		09-29-2006	Female	Resolved - Cystic Fibrosis		N/A
○	274-00-077/21-2006-72	MEZA		09-07-2005	Female	Resolved - Cystic Fibrosis		N/A
○	278-51-065/21-2006-71	HARRIS-MA		10-03-2006	Male	Resolved - Suspect Cystic Fibrosis		N/A
○	279-88-312/21-2006-11	CWYNAR		10-03-2006	Male	Pending		N/A

Resolved Cases

Select	Accn Number	Last Name	First Name	DOB	Gender	Case Resolution
○	274-69-071/21-2006-72	RUIZ	BOY	09-27-2006	Male	Lost to follow-up

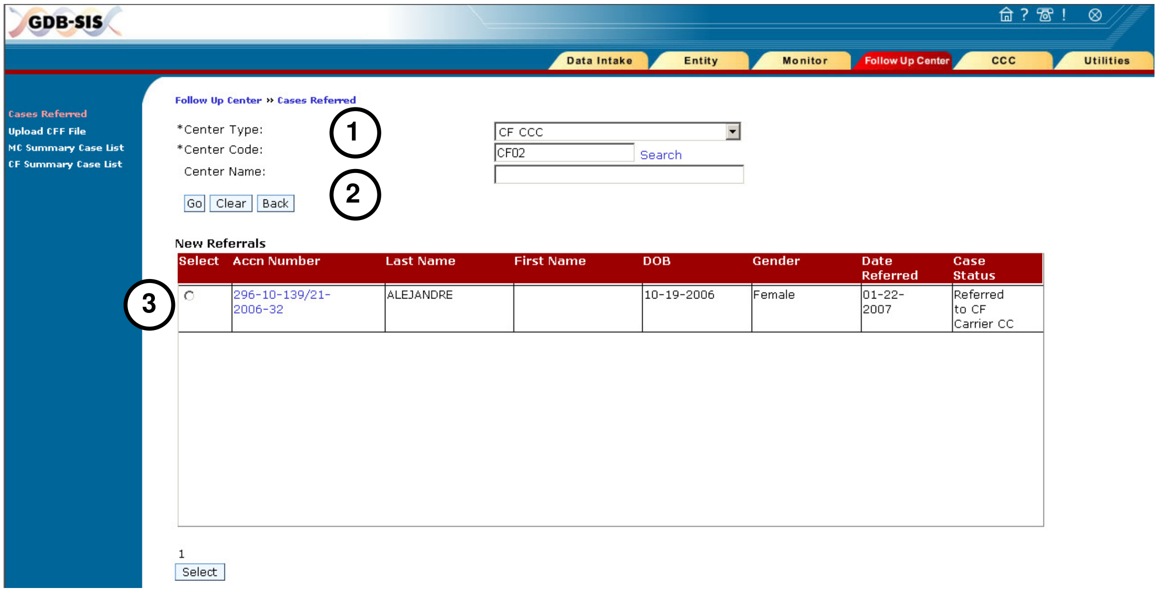
4. **Pending Cases:** Displays all cases for which a CFSR has been entered, but not yet completed.
5. **Resolved Cases:** Displays all cases for which follow-up has been completed.

Cases Referred – CF Counseling Center

Follow-Up Center >> Cases Referred

This screen will list cases referred to the CF Counseling Center (CFCC) and allows the users to link to case information.

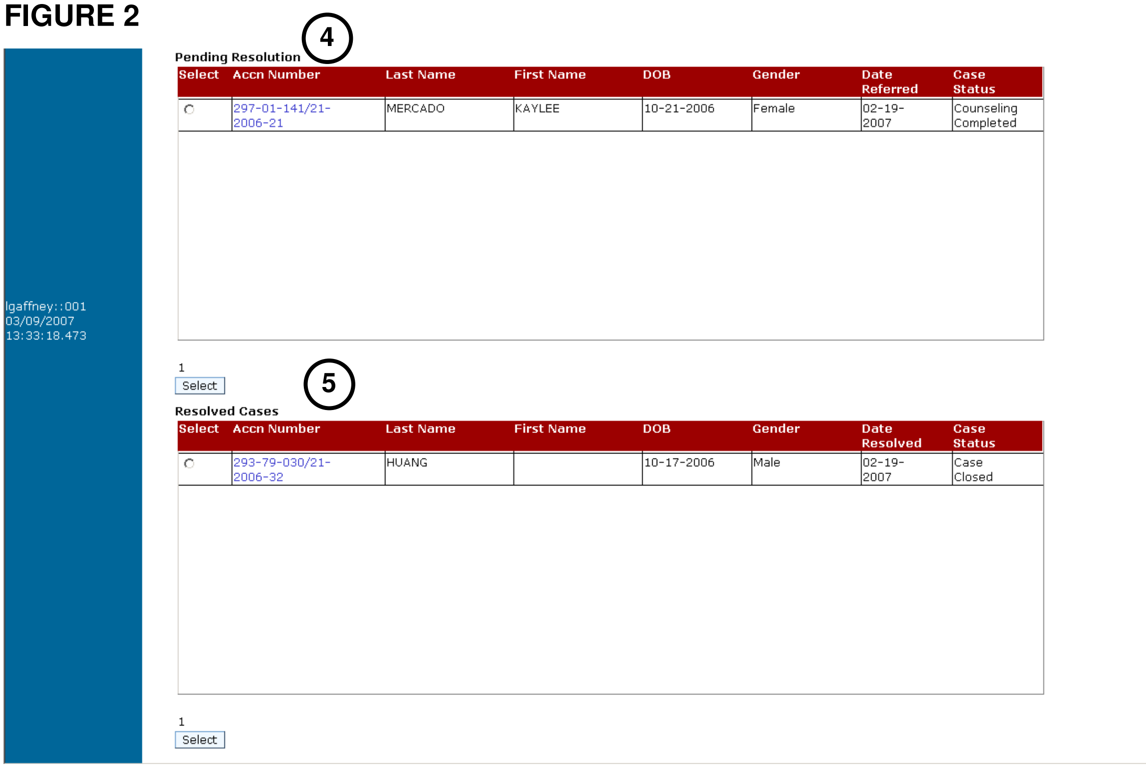
FIGURE 1



1. The **Center Type** and **Center Code** fields will be pre-populated. They will either be read-only or editable depending on the security access enabled for the SIS user logging in.
2. **Buttons:**
   a. **Go:** Allows you to view all cases referred to the CFCC.
   b. **Clear:** Removes all information from the screen including the **Center Type, Center Code**, and **Center Name** from the **Cases Referred** grid.
   c. **Back:** Displays the previous screen in SIS.
   d. **Select:** Advances to the next screen combined with the user selection of a radio button on a grid.
3. **New Referrals:** Displays all cases referred to the CFCC after the parents requested carrier counseling, and for which no information has been entered on the CF Carrier Counseling Checklist.

Cases Referred - CFCC (continued)

FIGURE 2

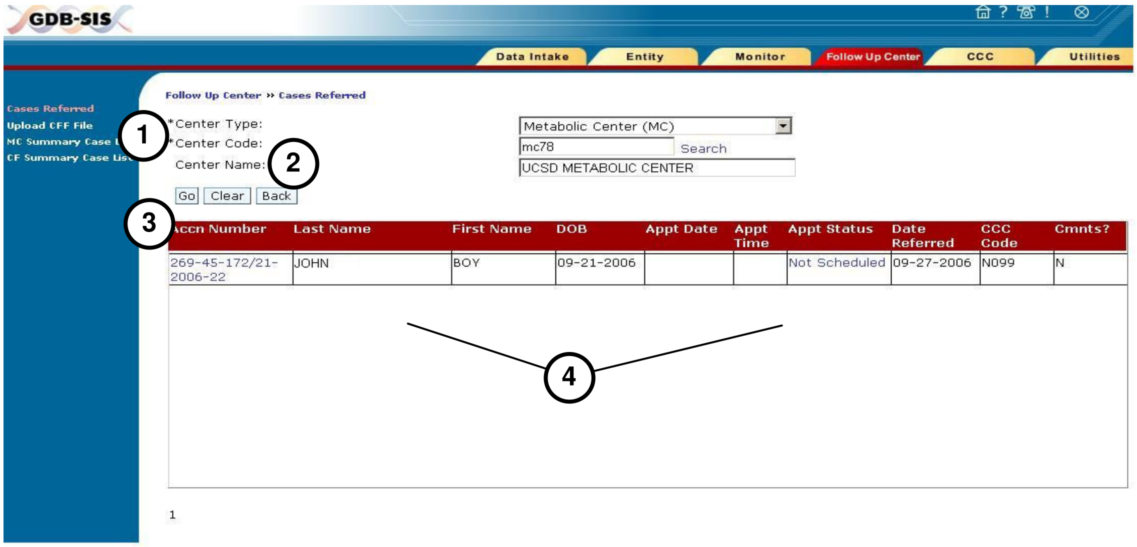


4. **Pending Cases:** This grid displays all cases for which a CF Carrier Counseling Checklist has been started but not completed and/or the counseling letters have not been completed.

5. **Resolved Cases:** This grid displays all resolved cases up to 30 days after the case resolution date.

Cases Referred – Metabolic Center (MC)

Follow-Up Center >> Cases Referred
This screen lists cases referred to a specific Metabolic Center (MC) and allows the users to link to case information.
FIGURE 1



1. If you only have access to view information for one Follow-Up Center, the **Center Type** field will be pre-populated in a read-only format, based on your log-in information. However, if you have access to view information for multiple Follow-Up Centers, you must select a Center Type (Prenatal Diagnosis Center, Sickle Cell Counseling Center, CF Center or CFCC Center). **Center Type** is a required field denoted by the (*).

2. **Center Code** is a required field denoted by the (*). If you do not know the Center Code, click the **Search** link to search for and select an entity.

3. **Buttons:**

   a. **Go:** Allows you to view all cases referred to your Follow-Up Center.

   b. **Clear:** Removes all information from the screen including the **Center Type, Center Code, Center Name** and the **Cases Referred** grid. After your first search, click the **Clear** button to remove all previously reviewed patient appointment information to search for a second Follow-Up Center's referrals.

   c. **Back:** Displays the previous screen in SIS discarding any unsaved additions or changes.

4. **Cases Referred** grid displays all cases referred to your Follow-Up Center and the appointment status (Scheduled, No Show, Cancelled, or Kept). The grid entries can be sorted (alphanumeric ascending or descending order) by clicking on any of the column names.

   a. **Accn. Number:** Clicking an Accession Number link will navigate to the Case Summary (PNS) screen.

   b. **Last Name:** Clicking the Last Name link will navigate to the Client Profile screen.

   c. **Appt. Status:** Clicking the Appt. Status link will navigate to the Schedule and View Appointment information screen where appointments can be made or appointment status modified.

Cases Referred - Metabolic Center (continued)

FIGURE 2

Pending Cases

Accn Number	Last Name	First Name	DOB	Appt Date	Appt Time	Appt Status	Date Referred	CCC Code	Cmnts?
215-74-055/21-2005-22	MERCADO AKA Contreras-Mercado	Jhaved	07-29-2005			Not Scheduled	06-23-2006	N099	N
025-90-437/21-2006-21	JACKSON	JADEN	01-20-2006	05-09-2006	1500	Scheduled	01-30-2006	N099	Y
039-41-237/21-2006-22	CHOW aka Conz	Finley	02-04-2006	04-25-2006	1500	Scheduled	02-13-2006	N099	Y
220-64-334/21-2006-11	RICHARDSON	TY	08-02-2006	10-10-2006	1300	Scheduled	08-10-2006	N099	N
234-18-186/21-2006-22	RUDOLPH aka Mendez	BOY Diego	08-18-2006	10-24-2006	1300	Scheduled	09-18-2006	N099	N
243-58-023/21-2006-72	DESMOND	Thomas	08-27-2006	09-12-2006	1300	Scheduled	09-08-2006	N094	N
262-95-216/31-2006-22	ABE BROWER	EYAL	09-05-2006			Not Scheduled	09-20-2006	N099	N
269-45-172/21-2006-22	SALAZAR	BOY	09-21-2006			Not Scheduled	09-27-2006	N099	N
269-31-320/21-2006-22	NAVARRO	MALE	09-20-2006			Not Scheduled	09-27-2006	N099	N

1

Resolved Cases

Accn Number	Last Name	First Name	DOB	Appt Date	Appt Time	Case Status	Disorder	Date Referred	CCC Code	Cmnts?
269-45-172/21-2006-22	RICHIE	BOY	09-21-2006	09-12-2006		RESOLVED DISORDER	PKU	09-20-2006	N 099	

1

Phe Monitoring Resolved Cases

Accn Number	Last Name	First Name	DOB	Appt Date	Appt Time	Case Status	Disorder	Date Referred	CCC Code	Cmnts?
262-95-216/31-2006-22	JIMMY	BOY	08-27-2006	10-24-2006		RESOLVED DISORDER	PKU	09-08-2006	N 099	

1

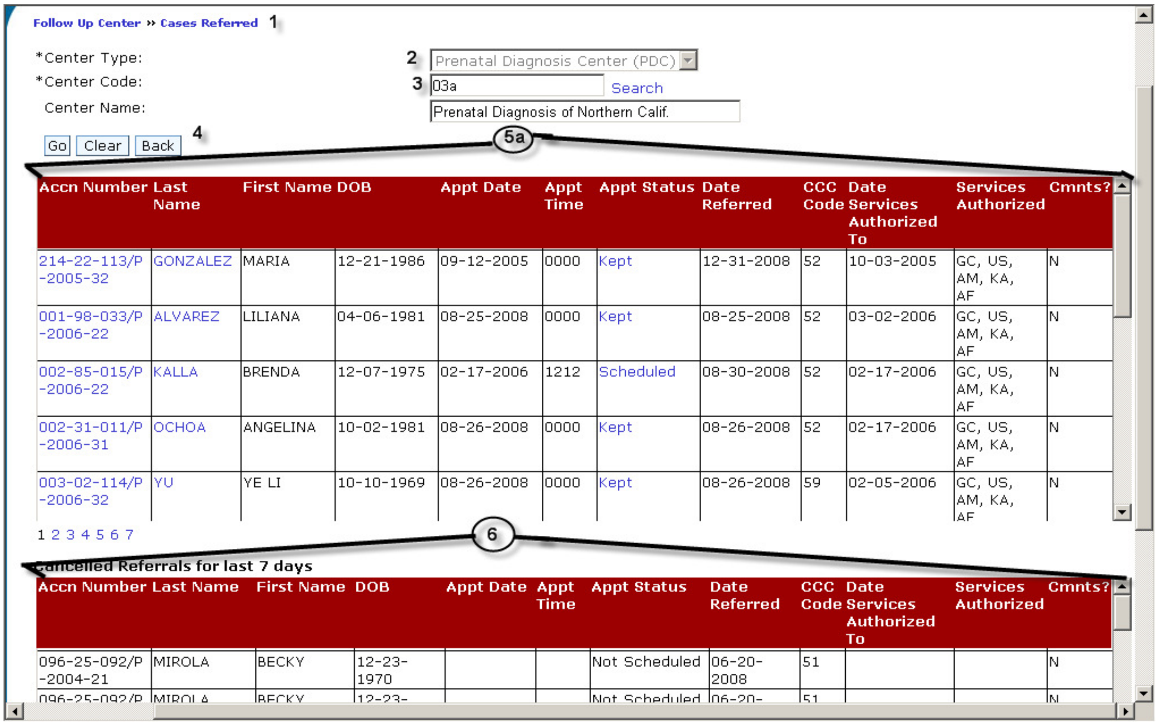
5. Case status for the above three grids will come from the most recent case status entry from the MSR table. After an MSR form is completed, the case will move down to one of these three grids – **Pending Cases, Resolved Cases, or Phe Monitoring Resolved Cases**.

Cases Referred – PDC, SCCC

Follow Up Center >> Cases Referred

The **Cases Referred** screen will allow you to view referrals and appointment information at a specific Prenatal Diagnosis Center (PDC) and Sickle Cell Counseling Center (SCCC).

FIGURE 1



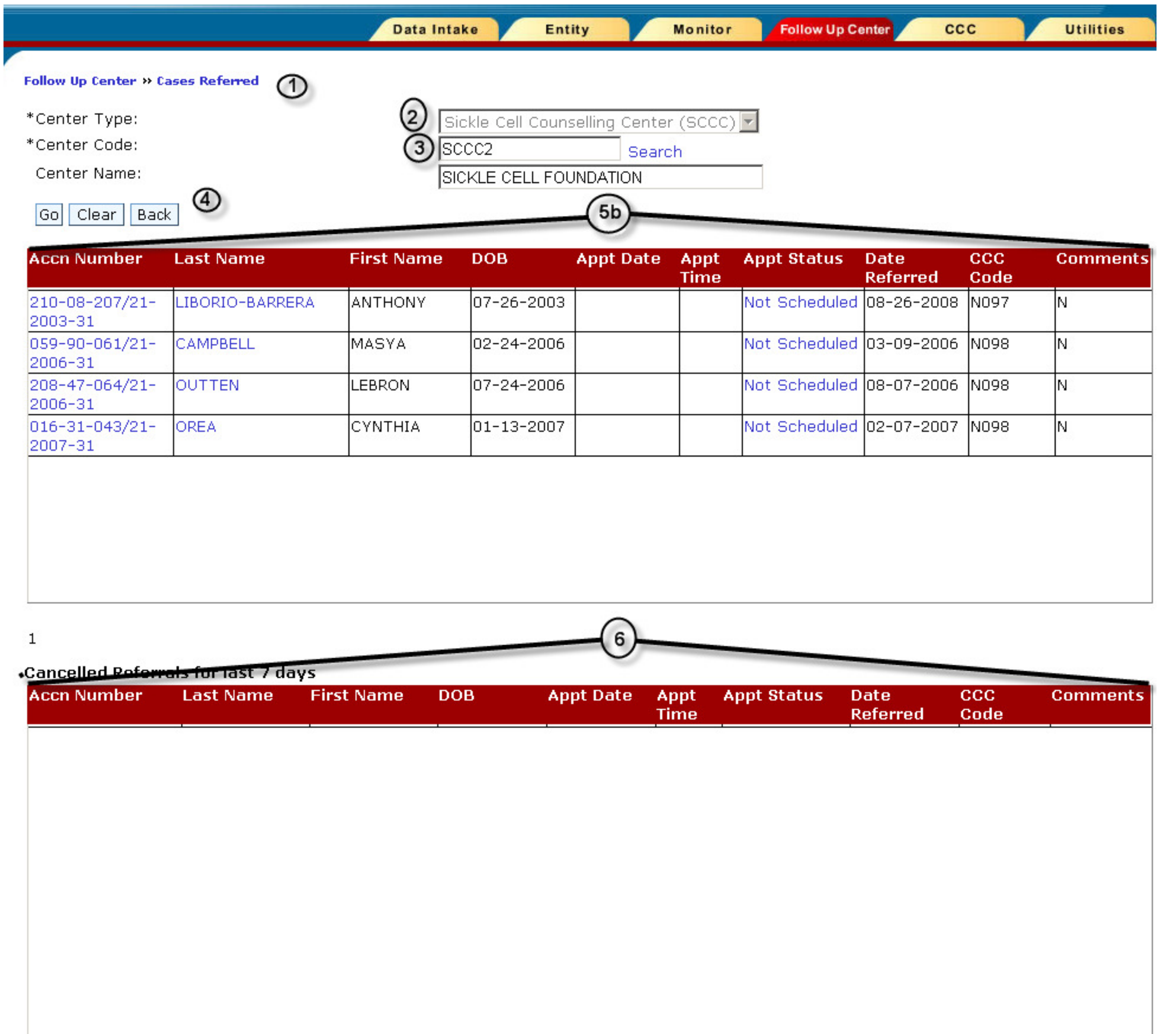
Accn Number	Last Name	First Name	DOB	Appt Date	Appt Time	Appt Status	Date Referred	CCC Code	Date Services Authorized To	Services Authorized	Cmnts?
214-22-113/P-2005-32	GONZALEZ	MARIA	12-21-1986	09-12-2005	0000	Kept	12-31-2008	52	10-03-2005	GC, US, AM, KA, AF	N
001-98-033/P-2006-22	ALVAREZ	LILIANA	04-06-1981	08-25-2008	0000	Kept	08-25-2008	52	03-02-2006	GC, US, AM, KA, AF	N
002-85-015/P-2006-22	KALLA	BRENDA	12-07-1975	02-17-2006	1212	Scheduled	08-30-2008	52	02-17-2006	GC, US, AM, KA, AF	N
002-31-011/P-2006-31	OCHOA	ANGELINA	10-02-1981	08-26-2008	0000	Kept	08-26-2008	52	02-17-2006	GC, US, AM, KA, AF	N
003-02-114/P-2006-32	YU	YE LI	10-10-1969	08-26-2008	0000	Kept	08-26-2008	59	02-05-2006	GC, US, AM, KA, AF	N

Accn Number	Last Name	First Name	DOB	Appt Date	Appt Time	Appt Status	Date Referred	CCC Code	Date Services Authorized To	Services Authorized	Cmnts?
096-25-092/P-2004-21	MIROLA	BECKY	12-23-1970			Not Scheduled	06-20-2008	51			N
096-25-092/P	MIROLA	BECKY	12-23-			Not Scheduled	06-20-	51			N

1. Navigation and screen name.
2. If you only have access to view information for one Follow-Up Center, the **Center Type** field will be pre-populated in a read-only format, based on your login information. However, if you have access to view information for multiple Follow Up Centers, you must select a Center Type (Prenatal Diagnosis Center (PDC), Sickle Cell Counseling Center (SCCC) or Metabolic Center (MC) site). Center Type is a required field denoted by the (*).
3. **Center Code** is a required field denoted by the (*). When Center Code is unknown the **Search** link allows you to search and select an entity.
4. **Buttons**:
    a. **Go** – allows you to view all of the cases referred to your follow-up center.
    b. **Clear** – removes all information from the screen including the **Center Type**, **Center Code**, **Center Name** and the cases referred grid. After your first search, click the **Clear** button to remove all previous reviewed patient appointment information in order to search for a second follow-up center's referrals.
    c. **Back** – Displays the previous screen in SIS discarding any unsaved additions or changes.

Cases Referred – PDC, SCCC (continued)

FIGURE 2



Accn Number	Last Name	First Name	DOB	Appt Date	Appt Time	Appt Status	Date Referred	CCC Code	Comments
210-08-207/21-2003-31	LIBORIO-BARRERA	ANTHONY	07-26-2003			Not Scheduled	08-26-2008	N097	N
059-90-061/21-2006-31	CAMPBELL	MASYA	02-24-2006			Not Scheduled	03-09-2006	N098	N
208-47-064/21-2006-31	OUTTEN	LEBRON	07-24-2006			Not Scheduled	08-07-2006	N098	N
016-31-043/21-2007-31	OREA	CYNTHIA	01-13-2007			Not Scheduled	02-07-2007	N098	N

Accn Number	Last Name	First Name	DOB	Appt Date	Appt Time	Appt Status	Date Referred	CCC Code	Comments

5. **5a. Cases referred** (PDC) grid displays all cases that have been referred to your follow-up center and the appointment status of each (Scheduled, No Show, Cancelled or Kept). When the Appointment Status is changed to "Kept," for a PNS case, it will automatically drop off of the Cases referred grid in seven days. Cancelled referrals will be displayed in the Cancelled referrals grid. The grid entries can be sorted (alphanumeric ascending or descending order) by clicking on any of the column names.
    a. **Accn Number** – Clicking an Accession Number link will navigate to the old Case Summary (PNS) screen for Pre PEII Cases and will navigate to the new Case Summary (PNS) screen for Post PEII Cases.
    b. **Last Name** – Clicking the Last Name link will navigate to the Client Profile screen.

Cases Referred – PDC, SCCC (continued)

c. **Appt Status** – Clicking the Appt Status link will navigate to the Schedule and View Appointment Information screen where appointments can be made or appointment status modified.

5b. **Cases referred (SCCC)** grid displays all cases that have been referred to your follow-up center with and the appointment status of each (Scheduled, No Show, Cancelled or Kept Cancelled referrals will be displayed in the **Cancelled referrals** grid. The referral grid entries can be sorted (alphanumeric ascending or descending order) by clicking on any of the column names.

a. **Accn Number** – Clicking an Accession Number link will navigate to the Case Summary (NBS) screen.

b. **Last Name** – Clicking the Last Name link will navigate to the Client Profile screen.

c. **Appt Status** – Clicking the Appt Status link will navigate to the Schedule and View Appointment Information screen where appointments can be made or appointment status modified.

6. **Cancelled Referrals for last 7 days** grid will display information for patients that have cancelled appointments within the last 7 days. Alert 5 “Patient appointment cancelled. Please follow-up” is sent to the CCC.

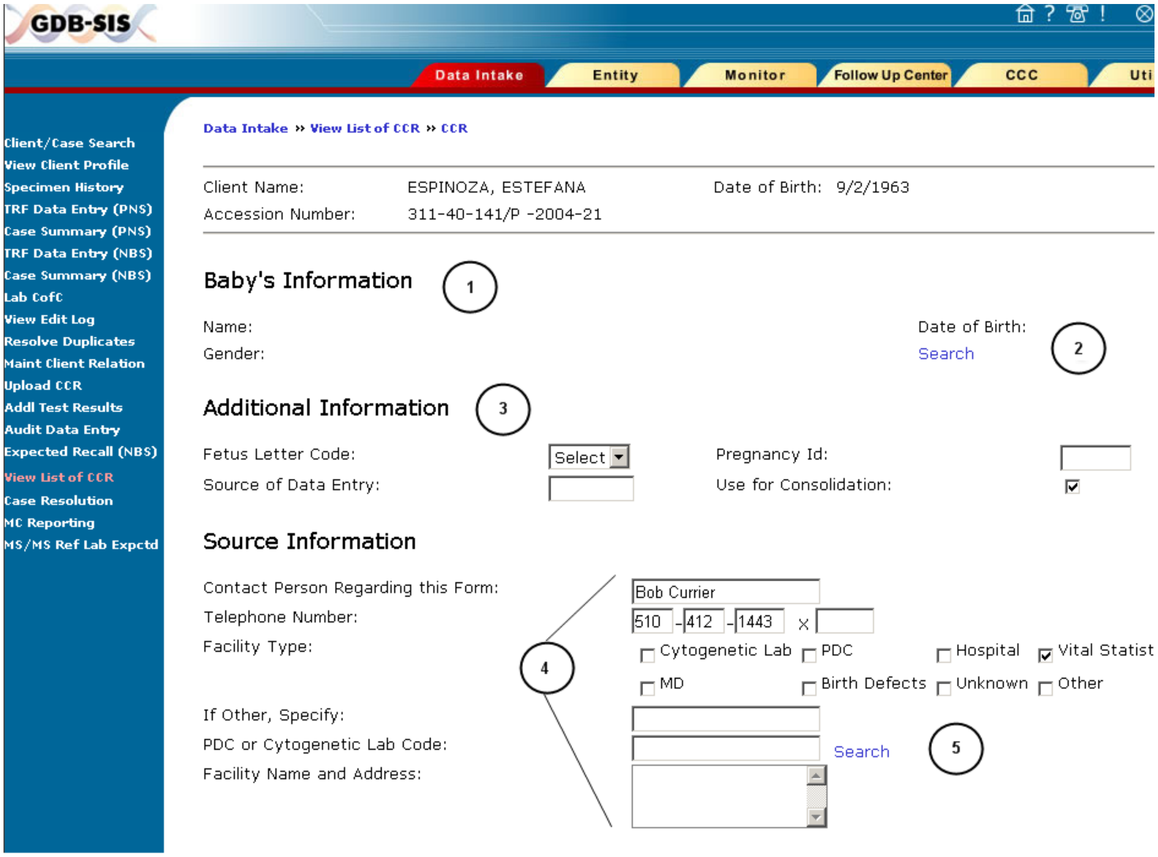
CCR (Confidential Case Report)

Data Intake >> View List Of CCR >> CCR

This screen allows you to view, enter, and edit a Confidential Case Report (CCR) for a specified PNS client. Once a completed form is saved, the data is available for review by the Registry Monitor as a possible case for the NTD and/or Chromosomal Registries. If there is more than one CCR source available for the same client, you must make independent choices regarding which data to enter. In effect, you will manually consolidate the data from multiple CCR sources into one CCR record in SIS.

CCR (Confidential Case Report) - (continued)

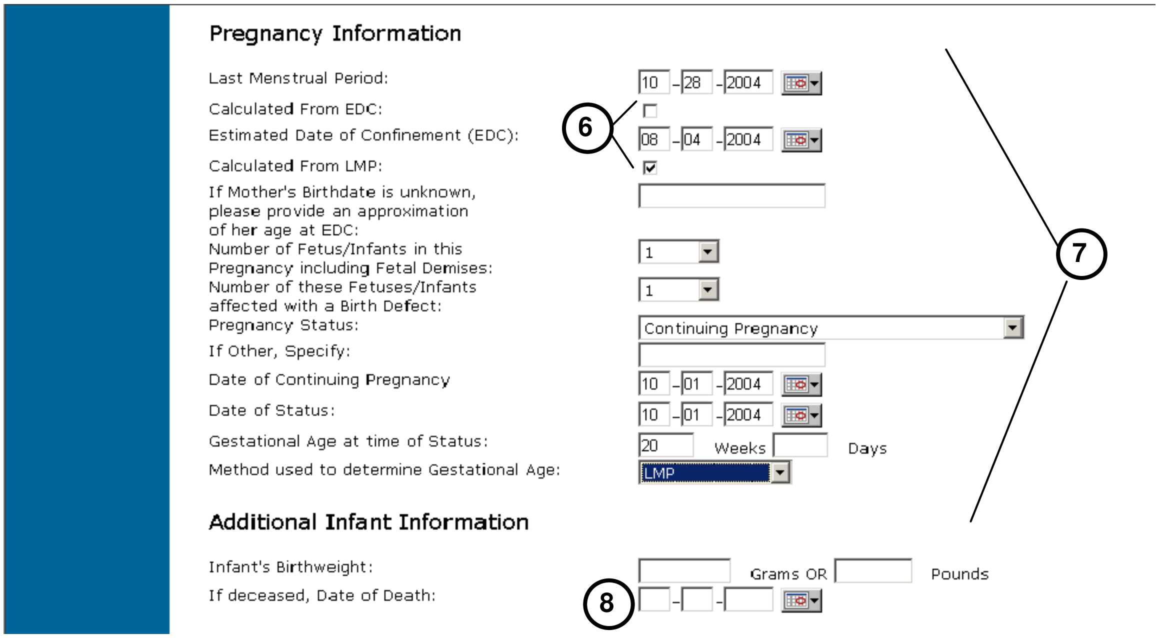
FIGURE 1



1. **Baby's Information** section is used to link the baby client to the mother client, when applicable.
2. Click the **Search** link to navigate to the **Maintain Client Relationships** screen to select the baby's client ID from the list of clients related to the mother.
3. **Additional Information:** Fetus Letter Code, Pregnancy Id, Source of Data Entry and Use for Consolidation information are displayed.
4. **Source Information:** These fields are entered to track details about the source of the CCR, such as contact person, telephone number, and facility type.
5. In order to obtain the **PDC or Cytogenetic Lab Code** and **Facility Name and Address** for a PDC or Cytogenetic Lab, you must click the **Search** link, which directs you to the Search Entity screen.

CCR (Confidential Case Report) - (continued)

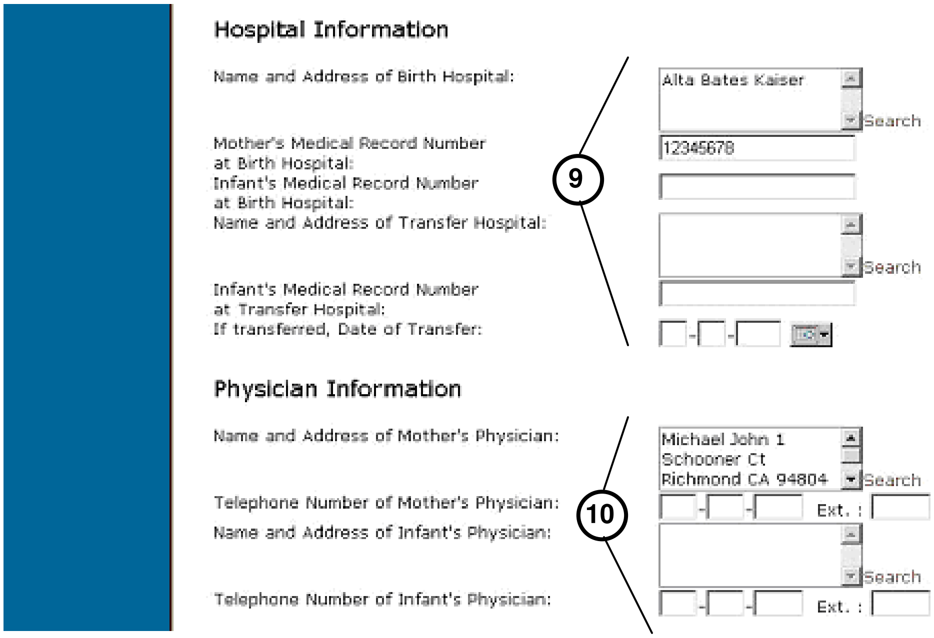
FIGURE 2



6. **Pregnancy Information:** These fields are entered to track details about the pregnancy, such as LMP date, EDC, pregnancy status, etc.
7. Only one of **Calculated from EDC** (for LMP field) or **Calculated from LMP** (for EDC field) should be checked.
8. **Additional Infant Information:** These fields are entered to track other details about the infant.

CCR (Confidential Case Report) - (continued)

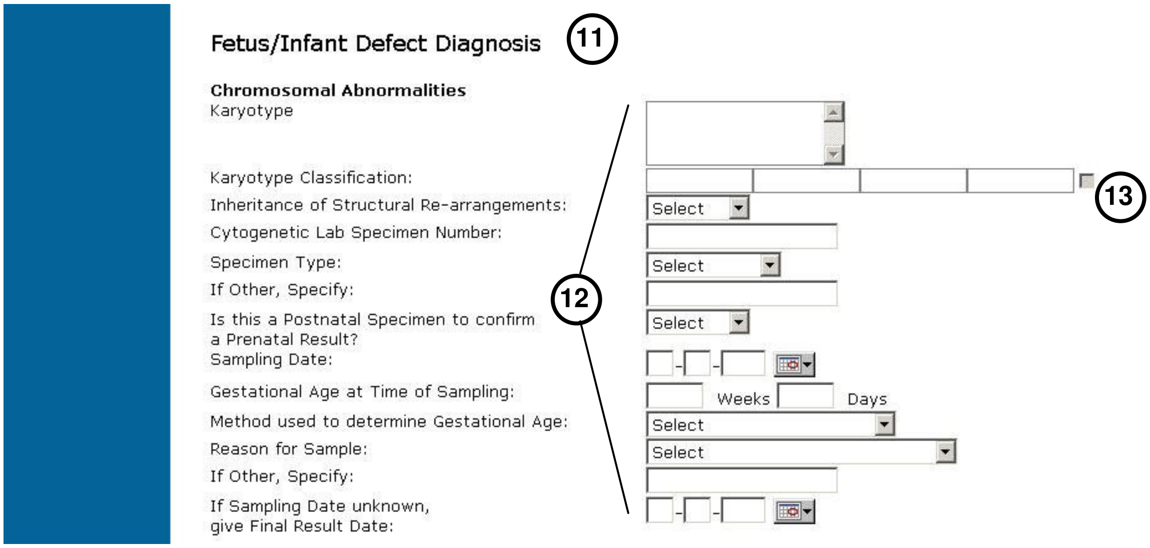
FIGURE 3



9. **Hospital Information:** These fields are entered to track details about the birth and transfer Hospital. In order to obtain the **Name and Address of Birth** or **Transfer Hospital**, you must click the Search link, which directs you to the Search Entity screen.
10. **Physician Information:** These fields are entered to track details about the mother's and/or infant's physician. In order to obtain the **Name and Address of Mother's** or **Infant's Physician,** you must click the Search link, which directs you to the Search Entity screen.

CCR (Confidential Case Report) - (continued)

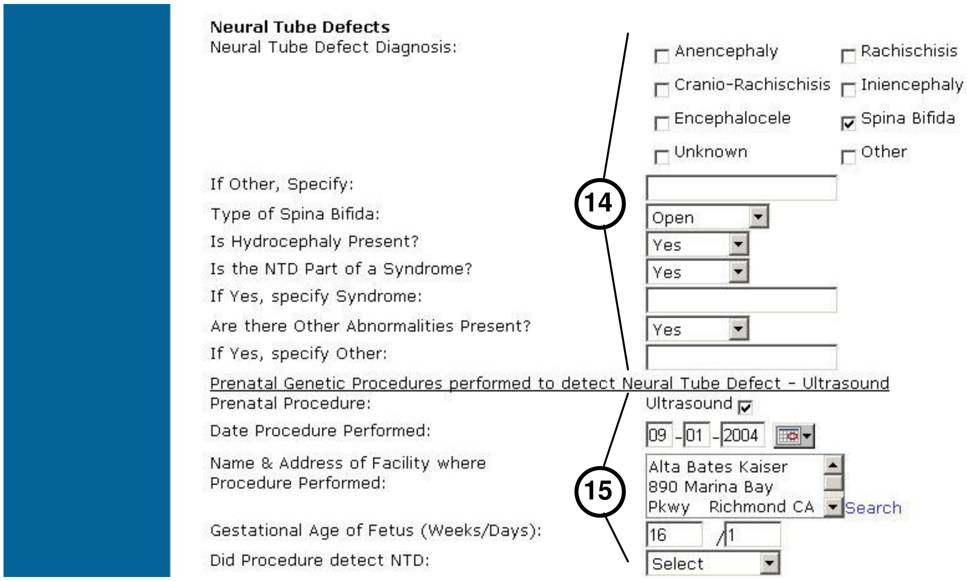
FIGURE 4



11. **Fetus/Infant Defect Diagnosis:** These fields are entered to track details about any Fetus/Infant defects. Separate sections are available to distinguish between Chromosomal Abnormalities and NTDs (see #s 11 and 13).
12. **Chromosomal Abnormalities:** These fields are entered to track details about any Chromosomal Abnormalities, such as karyotype and classification, specimen type, reason for sample, etc.
13. For **Karyotype Classification,** if the coding program identifies more than four codes for the case, the first four will be displayed in the fields, and the checkbox will be filled.

CCR (Confidential Case Report) - (continued)

FIGURE 5

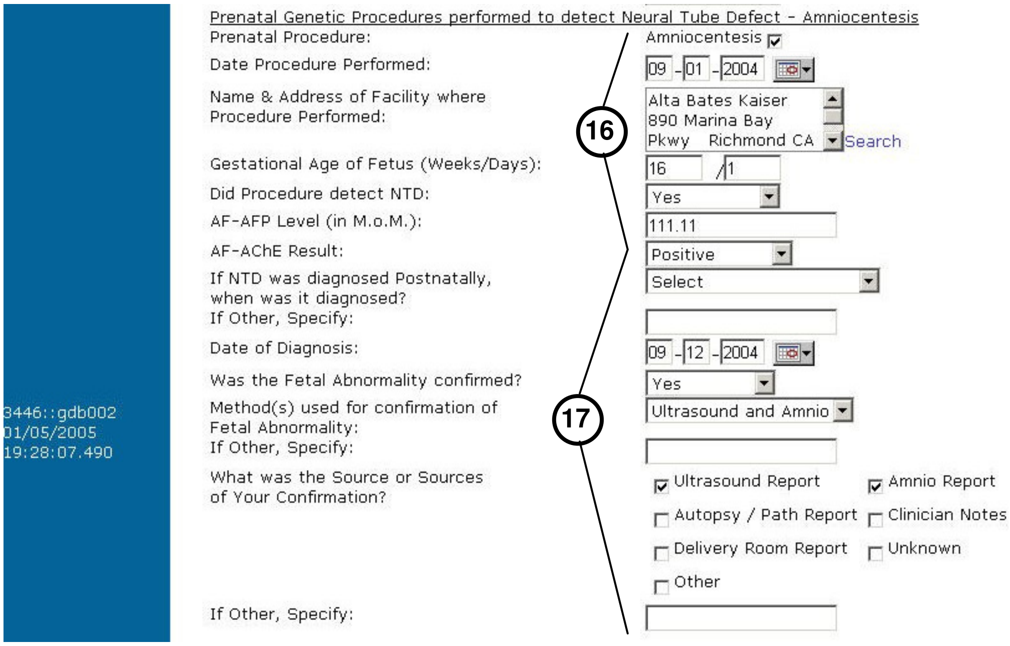


14. **Neural Tube Defects Diagnosis:** These fields are entered to track details about the NTD diagnosis, such as type of NTD, spina bifida, syndrome, etc.

15. **Prenatal Genetic Procedures performed to detect Neural Tube Defect – Ultrasound:** These fields are entered to track details about the ultrasound, such as date performed, facility performed, if the procedure detected a NTD, etc. In order to obtain the **Name and Address of Facility where Procedure Performed,** you must click the Search link, which directs you to the Search Entity screen.

CCR (Confidential Case Report) - (continued)

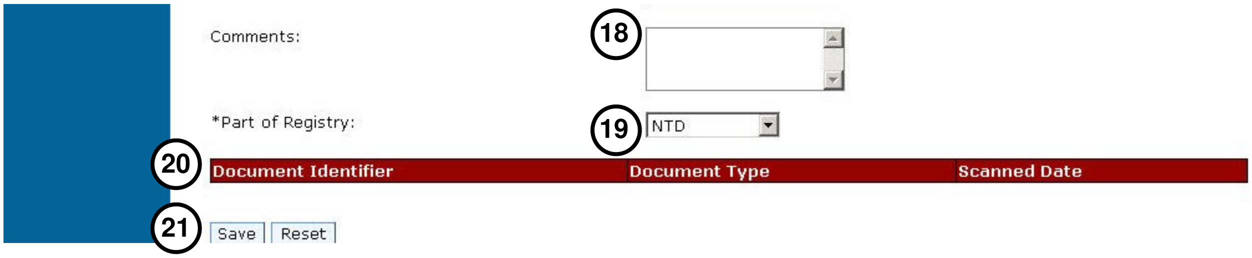
FIGURE 6



16. **Prenatal Genetic Procedures performed to detect Neural Tube Defect – Amniocentesis:** These fields are entered to track details about the amniocentesis, such as date performed, facility performed, amniocentesis results, etc. In order to obtain the **Name and Address of Facility where Procedure Performed**, you must click the Search link, which directs you to the Search Entity screen.
17. General NTD diagnosis information can be tracked, such as date of diagnosis, confirmation of fetal abnormality, sources of confirmation, etc.

CCR (Confidential Case Report) - (continued)

FIGURE 7



18. **Comments** is a free text field. You may enter any comments for this CCR.
19. **Part of Registry** is a required field. You must select a registry (NTD, Chromosome, or both) to which to add the CCR information.
20. This grid will display information about the scanned CCR forms, and provides a link to view each CCR image for the case.
21. **Buttons:**
    a. **Save** button saves your data in SIS. Once the data is saved, it can be reviewed by the Registry Monitor as a possible case for the NTD and/or Chromosomal Registry. Warnings may appear when you attempt to save the data. These warnings may be overridden, so you may save the data successfully despite potential errors flagged by the field level validations.

    Reset button reloads the screen and clears the information from all fields, discarding any unsaved data.

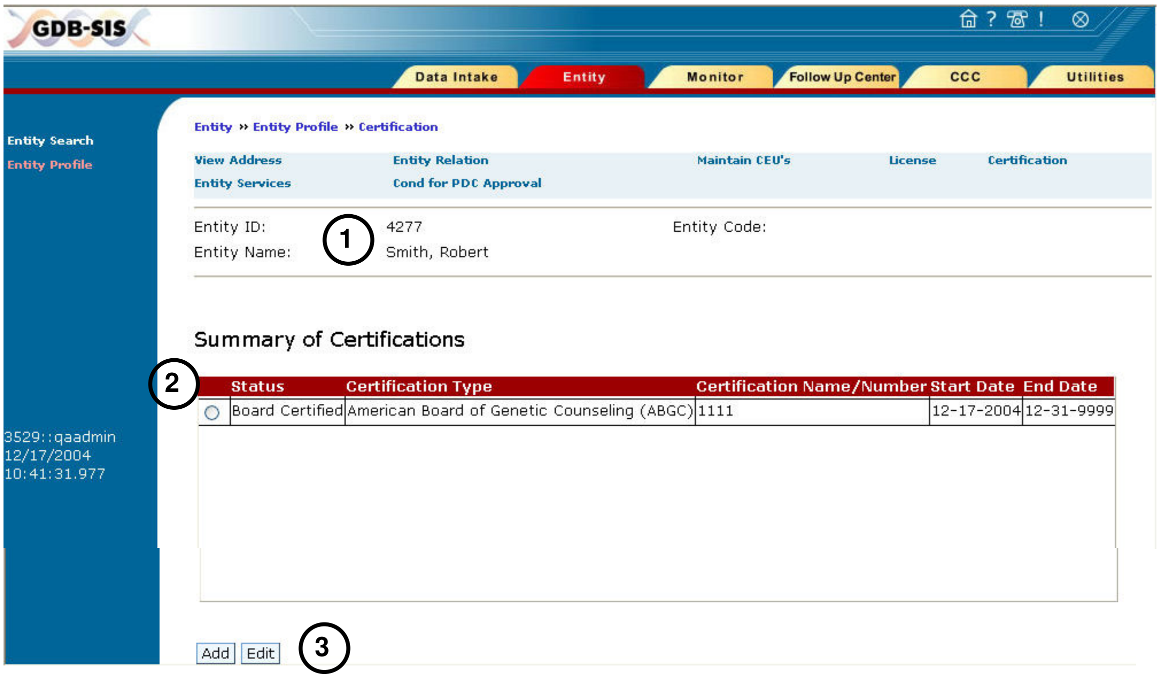
Certification

Entity >> Entity Profile >> Certification

The **Certification** screen is used to view, create and update certification information for an entity. Certification can apply to people, laboratories, organizations, etc.

Users with proper security settings can only edit **Certifications'** for NT practitioner

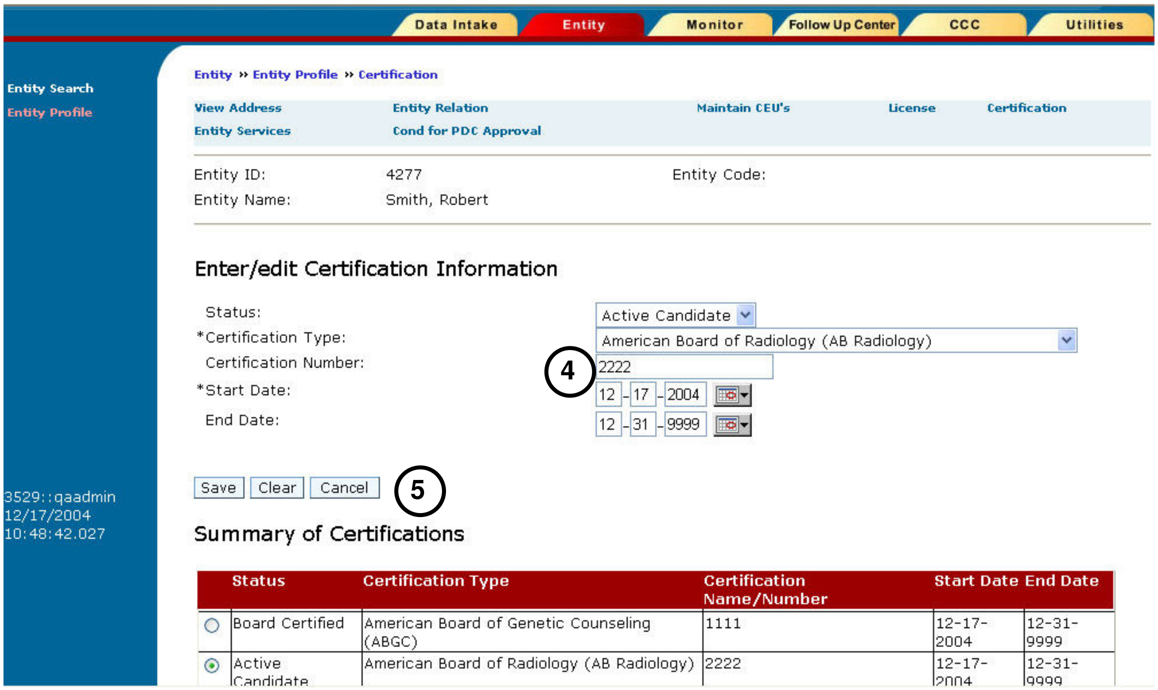
FIGURE 1



1. Information about the entity that is currently selected is displayed in a read-only format. To update this information you must use the **Entity Profile** screen.
2. The **Summary of Certifications** grid displays existing certification information for the selected entity.
3. **Buttons:**
    a. Click the radio button next to the certification and then click the **Edit** button to make changes to the selected certification record (see **FIGURE 2**).
    b. Click the **Add** button to add a new certification record for the selected entity (see **FIGURE 2**).

Certification (continued)

FIGURE 2



4. Update the existing certification information. **Certification Type** and **Start Date** are required fields. If available, enter the certification expiration in the **End Date** field. If no value is entered then SIS will automatically enter "12/31/9999".

5. **Buttons:**
   a. Click the **Save** button to save the updated certification record with the information you entered in the fields above.
   b. Click the **Clear** button to clear the information you have entered discarding any unsaved data.
   c. Click the **Cancel** button to discard any unsaved certification information you have entered and return to the previous screen.

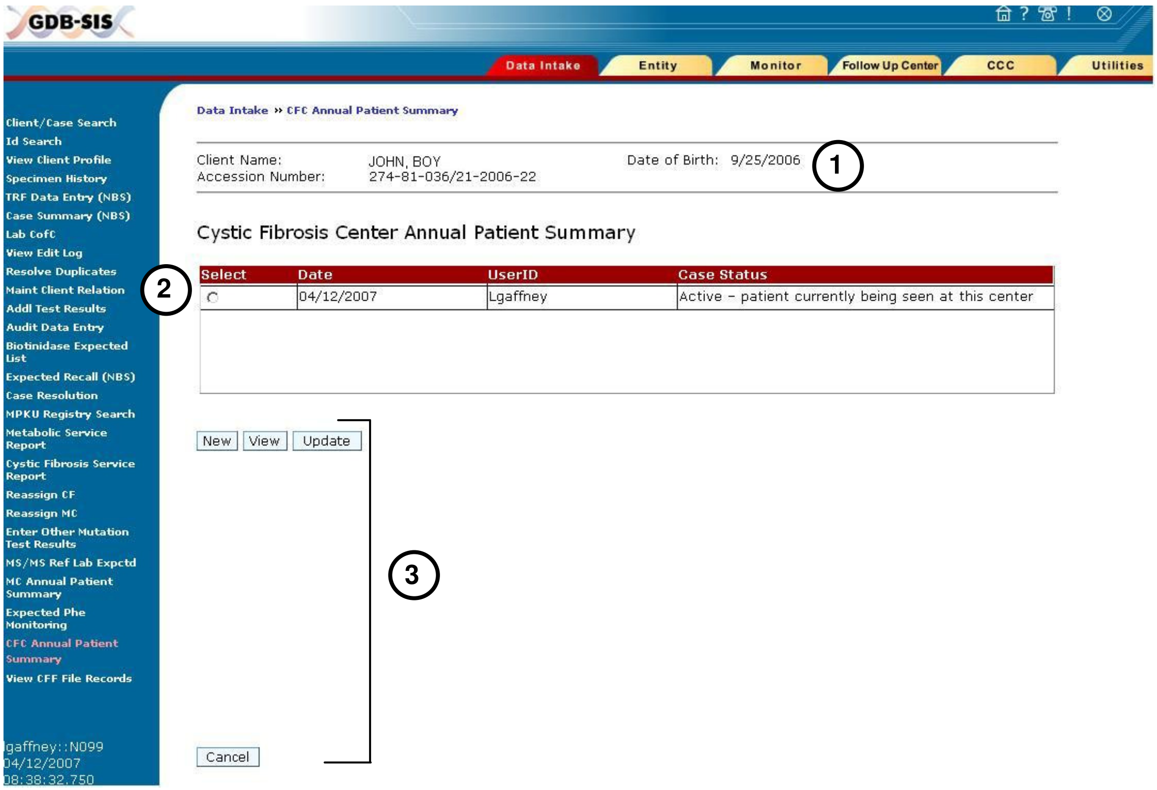
Note: If you click the Add button instead of the Edit button (see Figure 1), the fields will be empty. After clicking the Save button a row will be added to the Summary of Certifications grid.

CF Annual Patient Summary

Data Intake >> CF Annual Patient Summary

The CF Annual Patient Summary screen captures the patient summary forms that are completed yearly by Cystic Fibrosis Centers on each of their patients. These forms capture the general health and any treatments performed on children who have cystic fibrosis for the first six years of their lives.

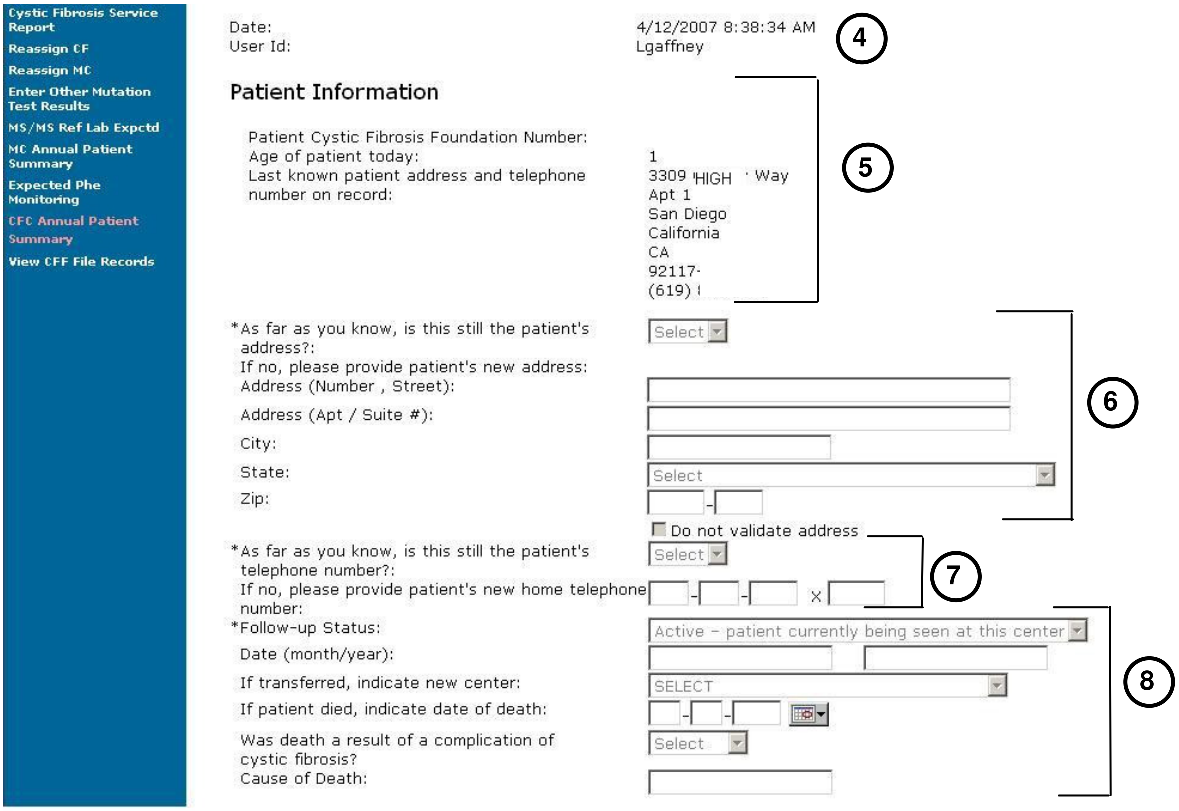
FIGURE 1



1. Displays client and case information in read-only format.
2. Lists all CF annual patient summaries that have been completed for the client in the grid. Use the **Select** radio button to indicate the specific annual patient summary to be displayed.
3. **Buttons**:
   a. **New:** Displays a new, blank annual patient summary form for the patient.
   b. **View:** Displays the annual patient summary selected in the grid in read-only mode.
   c. **Update:** Displays the annual patient summary selected in the grid in update mode.
   d. **Cancel:** Refreshes the screen.

CF Annual Patient Summary (continued)

FIGURE 2



4. Displays the current date, time and user id for the person logged in .
5. **Patient Information:** Captures patient contact information and high level details regarding the patient's case.
6. Select whether the patient's address is up-to-date. If it is not current, enter the current address, city, state and zip code in the fields that follow. If you prefer that the address not be validated against the post office's dates for accuracy, check the **Do not validate address** checkbox.
7. Select whether the patient's telephone number is up-to-date. If it is not current, enter the current telephone number in the fields that follow.
8. **Follow-Up Status**: Select the follow-up status for the patient.
   a. If the follow-up status is Transferred, enter the date of the transfer in the **Date (month/year)** fields, and enter the location to which the patient was transferred in the **If Transferred, indicate new center** field.
   b. If the follow-up status is Lost to follow-up, enter the date the patient was lost to follow-up in the **Date (month/year)** fields.
   c. If the follow-up status is Moved out of state, enter the date the patient moved out of California in the **Date (month/year)** fields.

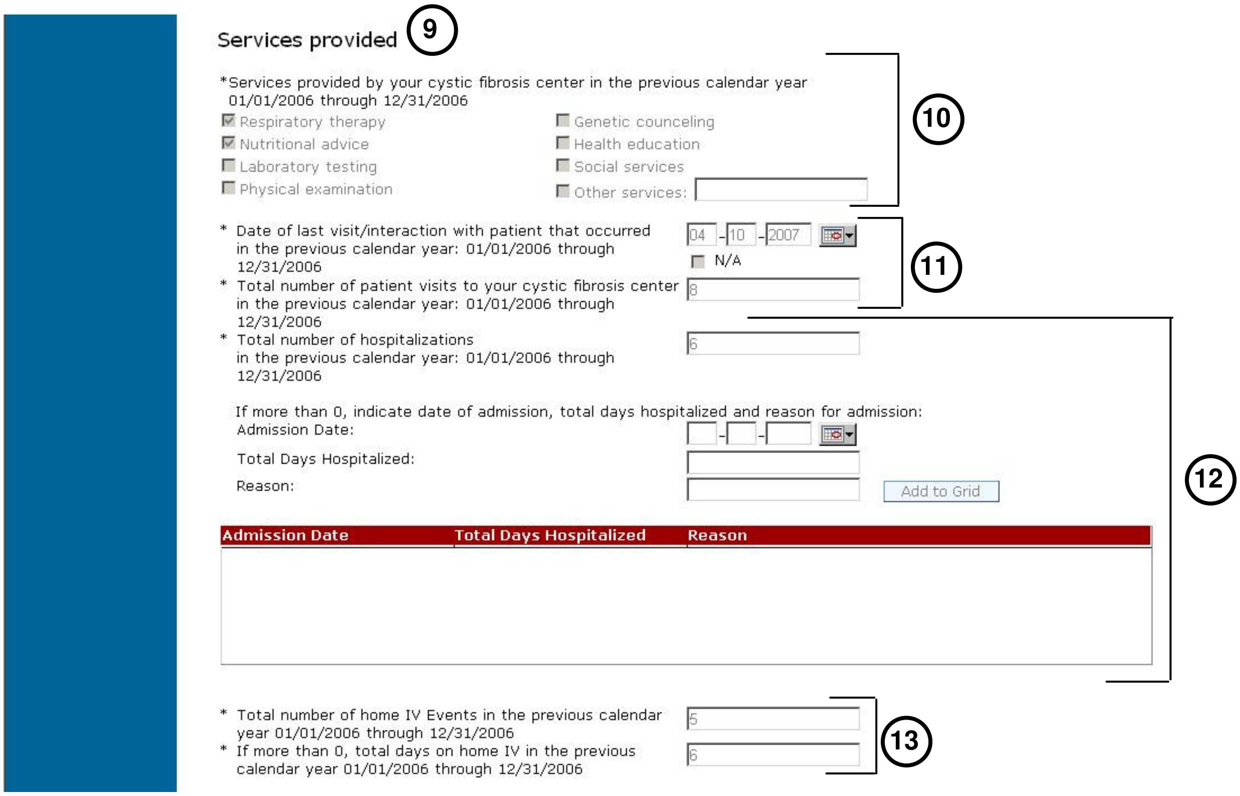
d. If the follow-up status is Refused follow-up, enter the date the patient refused follow-up in the **Date (month/year)** fields.

e. If the follow-up status is Treatment deemed not necessary, enter the date the treatment was deemed unnecessary in the **Date (month/year)** fields.

f. If the follow-up status is Patient died, enter the date death, using the calendar if desired. Indicate whether the death was the result of a complication of CF. If not, enter the actual **Cause of Death** in the blank box provided.

CF Annual Patient Summary (continued)

FIGURE 3



9. **Services Provided:** Captures all of the services that were provided to a patient within a specified time frame.

10. Check the services that were provided to the patient in the specified time frame. If services other than those listed on the screen were provided, check the first available **Other Services** checkbox, and specify the details of the service in the blank box that follows.

11. Determine when the last interaction with the patient occurred.

    a. If there was at least one interaction within the specified time frame, enter the date that the most recent of interaction with the patient occurred, as well as the total number of visits to the center in the specified time frame. If desired, use the calendar icon to fill in dates.

    b. If there were no interactions with the patient within the specified time frame, check **N/A**.

12. Enter the total number of times the patient was hospitalized within the specified time frame. If the patient was hospitalized at least once within the specified time frame, enter the details of each stay in the fields that follow. For each stay:

    a. Enter the date the patient was admitted. If desired, use the calendar icon.

    b. Enter the total number of days the patient was hospitalized

CF Annual Patient Summary (continued)

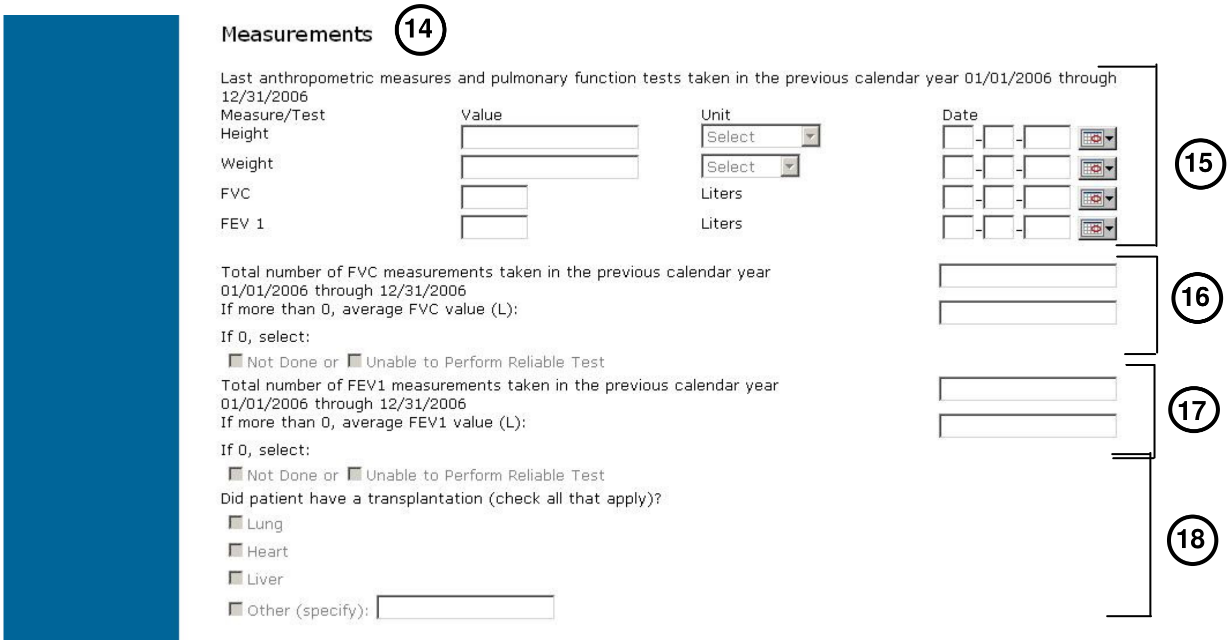
c. Enter the reason for the hospitalization.

d. Click the **Add to Grid** button. This will add the details of the stay to the grid below.

13. Enter the number of times the patient was on home IV within the specified time frame. If this occurred at least once, enter the total number of days that the patient was on home IV within the specified time frame.

CF Annual Patient Summary (continued)

FIGURE 4



14. **Measurements:** Captures the results of measurements and tests taken on the patient within the specified time frame.

15. Enter the **Value**, **Unit**, and **Date** that the most recent of each measurement and/or test was taken on the patient within the specified time frame. If desired, use the calendar icon to enter dates.

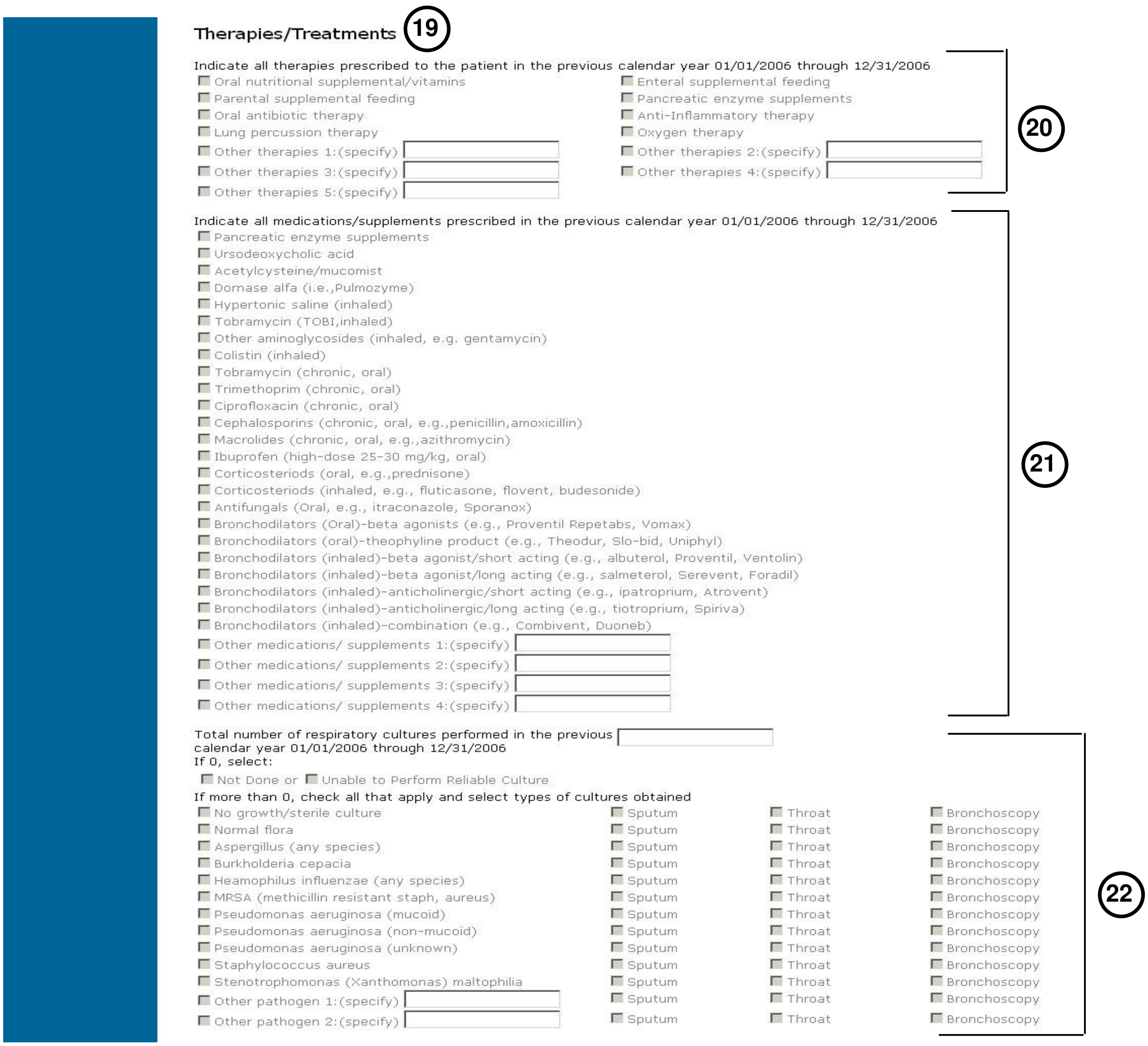
16. Enter the total number of FVC measurements taken on the patient within the specified time frame.
    a. If at least one measurement was taken, enter the average FVC value (L) that was taken in blank box.
    b. If no measurements were taken, check whether they were not provided because they were not taken, or because they could not be taken reliably.

17. Enter the total number of FEV1 measurements taken on the patient within the specified time frame.
    a. If at least one measurement was taken, enter the average FEV1 value (L) that was taken in blank box.
    b. If no measurements were taken, check whether they were not provided because they were not taken, or because they could not be taken reliably.

18. Check the types of transplantation that the patient has had. If transplantations other than those listed on the screen were performed, check the first available **Other (specify)** checkbox, and specify the type of transplantation in the blank box that follows.

CF Annual Patient Summary (continued)

FIGURE 5


Therapies/Treatments 19

Indicate all therapies prescribed to the patient in the previous calendar year 01/01/2006 through 12/31/2006

- Oral nutritional supplemental/vitamins
- Enteral supplemental feeding
- Parental supplemental feeding
- Pancreatic enzyme supplements
- Oral antibiotic therapy
- Anti-Inflammatory therapy
- Lung percussion therapy
- Oxygen therapy
- Other therapies 1:(specify)
- Other therapies 2:(specify)
- Other therapies 3:(specify)
- Other therapies 4:(specify)
- Other therapies 5:(specify)

20

Indicate all medications/supplements prescribed in the previous calendar year 01/01/2006 through 12/31/2006

- Pancreatic enzyme supplements
- Ursodeoxycholic acid
- Acetylcysteine/mucomist
- Dornase alfa (i.e.,Pulmozyme)
- Hypertonic saline (inhaled)
- Tobramycin (TOBI,inhaled)
- Other aminoglycosides (inhaled, e.g. gentamycin)
- Colistin (inhaled)
- Tobramycin (chronic, oral)
- Trimethoprim (chronic, oral)
- Ciprofloxacin (chronic, oral)
- Cephalosporins (chronic, oral, e.g.,penicillin,amoxicillin)
- Macrolides (chronic, oral, e.g.,azithromycin)
- Ibuprofen (high-dose 25-30 mg/kg, oral)
- Corticosteriods (oral, e.g.,prednisone)
- Corticosteriods (inhaled, e.g., fluticasone, flovent, budesonide)
- Antifungals (Oral, e.g., itraconazole, Sporanox)
- Bronchodilators (Oral)-beta agonists (e.g., Proventil Repetabs, Vomax)
- Bronchodilators (oral)-theophyline product (e.g., Theodur, Slo-bid, Uniphyl)
- Bronchodilators (inhaled)-beta agonist/short acting (e.g., albuterol, Proventil, Ventolin)
- Bronchodilators (inhaled)-beta agonist/long acting (e.g., salmeterol, Serevent, Foradil)
- Bronchodilators (inhaled)-anticholinergic/short acting (e.g., ipatroprium, Atrovent)
- Bronchodilators (inhaled)-anticholinergic/long acting (e.g., tiotroprium, Spiriva)
- Bronchodilators (inhaled)-combination (e.g., Combivent, Duoneb)
- Other medications/ supplements 1:(specify)
- Other medications/ supplements 2:(specify)
- Other medications/ supplements 3:(specify)
- Other medications/ supplements 4:(specify)

21

Total number of respiratory cultures performed in the previous calendar year 01/01/2006 through 12/31/2006
If 0, select:
Not Done or Unable to Perform Reliable Culture
If more than 0, check all that apply and select types of cultures obtained

No growth/sterile culture	Sputum	Throat	Bronchoscopy
Normal flora	Sputum	Throat	Bronchoscopy
Aspergillus (any species)	Sputum	Throat	Bronchoscopy
Burkholderia cepacia	Sputum	Throat	Bronchoscopy
Heamophilus influenzae (any species)	Sputum	Throat	Bronchoscopy
MRSA (methicillin resistant staph, aureus)	Sputum	Throat	Bronchoscopy
Pseudomonas aeruginosa (mucoid)	Sputum	Throat	Bronchoscopy
Pseudomonas aeruginosa (non-mucoid)	Sputum	Throat	Bronchoscopy
Pseudomonas aeruginosa (unknown)	Sputum	Throat	Bronchoscopy
Staphylococcus aureus	Sputum	Throat	Bronchoscopy
Stenotrophomonas (Xanthomonas) maltophilia	Sputum	Throat	Bronchoscopy
Other pathogen 1:(specify)	Sputum	Throat	Bronchoscopy
Other pathogen 2:(specify)	Sputum	Throat	Bronchoscopy

22

19. **Therapies/Treatments:** Captures all of the therapies and/or treatments that have been prescribed to the patient in the specified time frames.

20. Check all therapies that were prescribed to the patient in the specified time frames. If therapies other than those listed on the screen were performed, check the **Other therapies** checkbox, and specify the type of therapy in the blank box that follows.

21. Check all medications and/or supplements that were prescribed to the patient in the specified time frames. If medications other than those listed on the screen were performed, check the first available **Other medications/supplements** checkbox, and specify the type of medication in the blank box that follows.

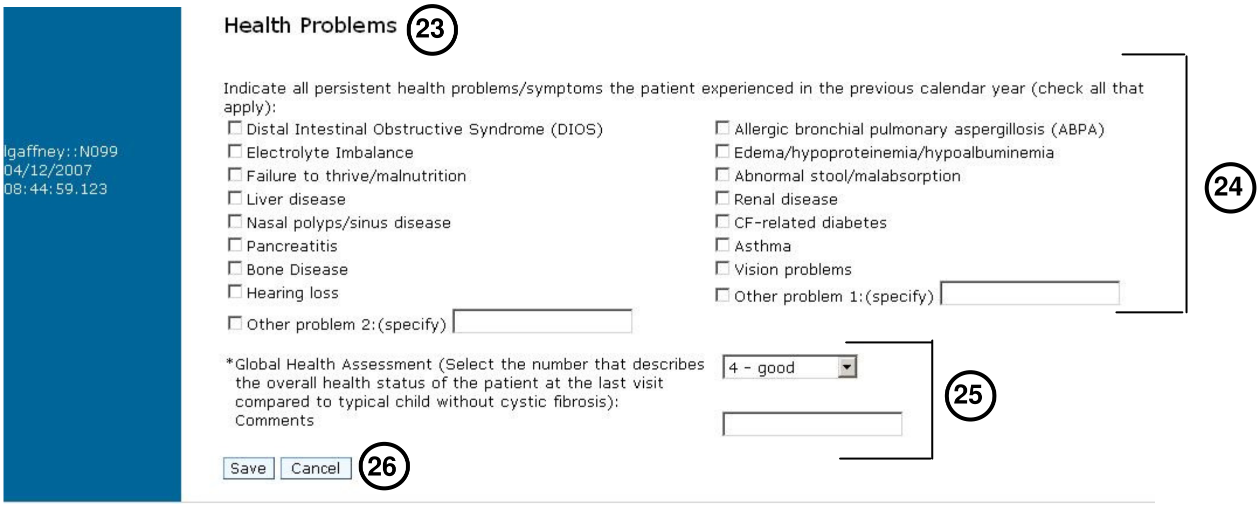
22. Enter the total number of respiratory cultures that were obtained in the specified time frame.

    a. If none were obtained, check whether they were not obtained because they were not done, or because they could not be done reliably.

    b. If at least one culture was obtained, check the types of cultures that were obtained in the specified time frame. If cultures other than those listed on the screen were obtained, check the first available **Other Pathogens** checkbox, and specify the culture that was obtained in the blank box that follows. For each culture, indicate whether it was obtained from the **Sputum**, **Throat** or via a **Bronchoscopy**.

CF Annual Patient Summary (continued)

FIGURE 6



23. **Health Problems:** Captures the health problems experienced by the patient within the specified time frame.

24. Check all persistent health problems and/or symptoms that were experienced by the patient in the specified time frame. If problems other than those listed were experienced, check the first available **Other problem** checkbox, and specify the problem in the blank box that follows.

25. Select the overall health status of the patient at the last visit, by comparing the patient's health against a child who does not have cystic fibrosis. Enter any details in the **Comments** field.

26. **Buttons:**

    a. **Save:** If any errors are present on the form, they are displayed in red on the screen, and the information will not save until they are corrected. If no errors are present, the detailed form is closed, and the new or updated CFSR appears in the **Cystic Fibrosis Services Report** grid that is displayed.

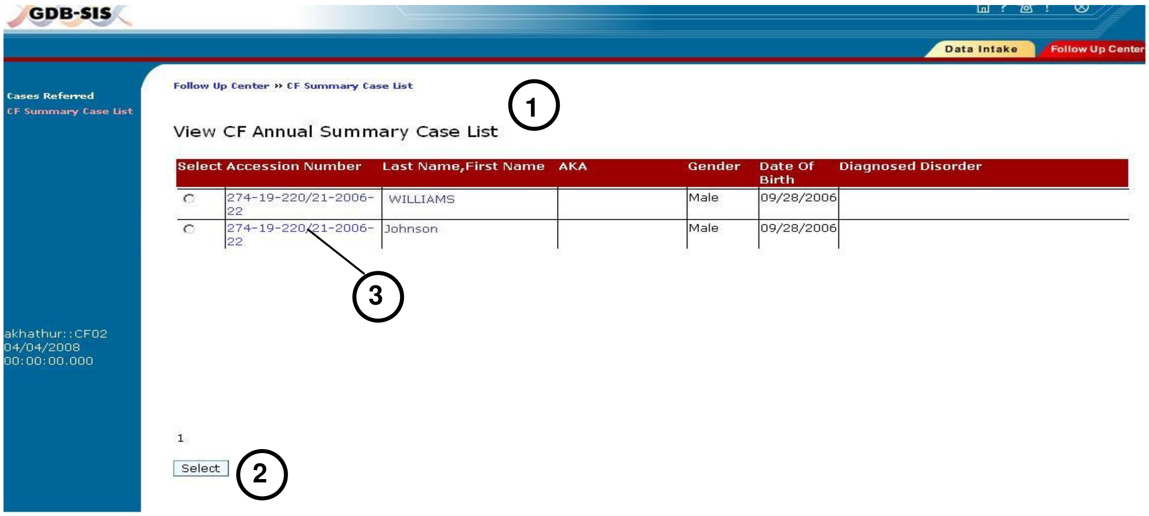
    b. **Cancel:** Restores the screen with data that existed on the screen after the Save button was last clicked.

CF Annual Summary Case List

Follow up Center >>CF Annual Summary Case List

The **View CF Annual Summary Case List** screen displays a list of all clients who require an annual patient summary from a CF center. The CF Annual Patient Summary is due annually, during the month after the child's birthday.

FIGURE 1



1. **View CF Annual Summary Case List:** Lists all clients who satisfy the following conditions:
   a. The client's case belongs to the user's CF center.
   b. The client's case is resolved as "CF" or "Suspect CF" on the client's most current CFSR.
   c. The client's case is active (i.e. the patient has no previous annual reports OR the Follow Up Status on the patient's most current annual report is Active or Transferred).
   d. The child is within the first six years of his/her life.
   e. An annual patient summary has not been filed for the patient at that age.
   f. The case/client is not already listed in the grid.

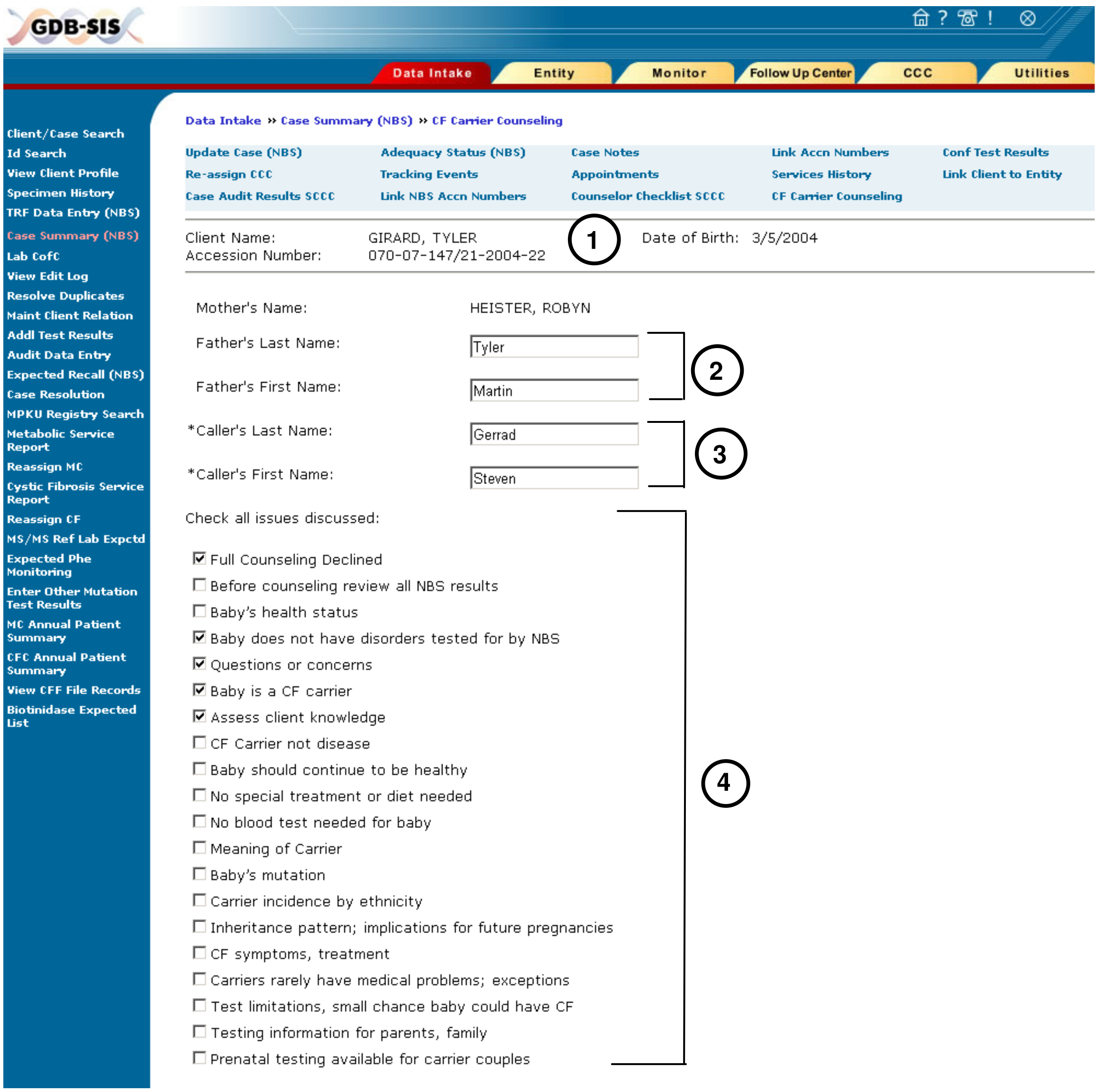
   The cases are removed from the list after an annual patient summary has been entered for the patient for that age. Use the **Select** radio button to indicate the specific case for which you would like to review the annual patient summaries.
2. **Buttons:**
   a. **Select:** Navigates to the CF Annual Patient Summary screen where it displays a list of annual patient summaries completed for the patient selected in the grid.
3. Click the appropriate **Accession Number** hyperlink on the grid to view the **Case Summary** screen for the case.

CF Carrier Counseling

Data Intake >> Case Summary (NBS) >> Carrier Counseling

This screen allows the CF carrier genetic counselor to record the counseling activities conducted with parents of babies identified as cystic fibrosis carriers by newborn screening.

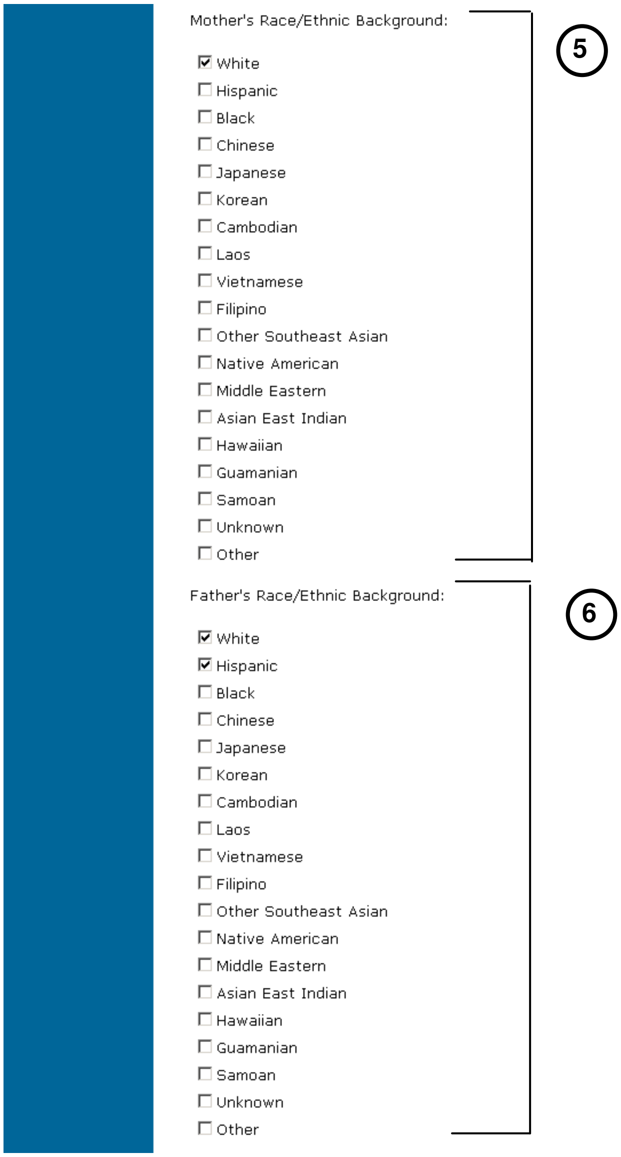
FIGURE 1



1. Displays client and case information in read-only format.
2. Enter father's last and first name.
3. Enter caller's last and first name. This information is required.
4. Check all issues that were discussed with the client. If the client declined complete counseling, check the **Full Counseling Declined** checkbox.

CF Carrier Counseling (continued)

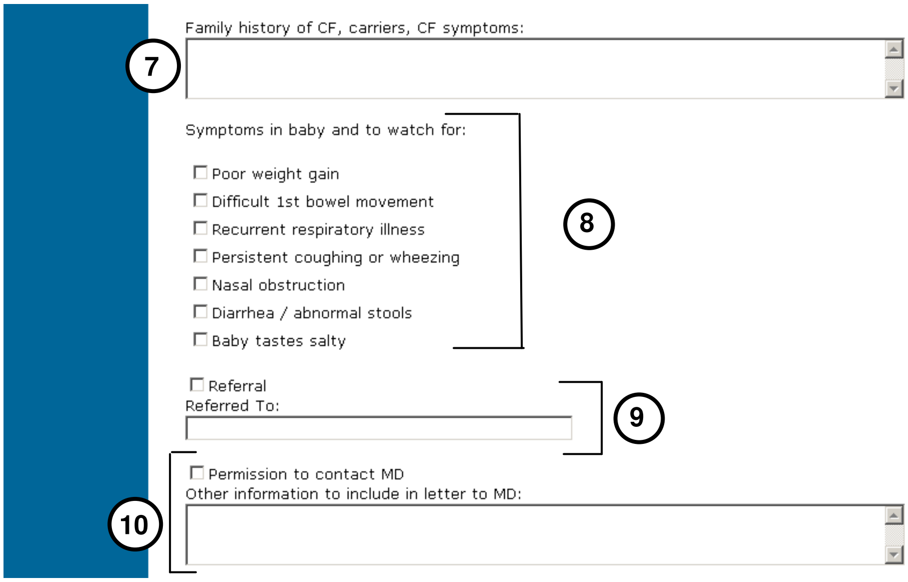
FIGURE 2



5. Check all ethnicities that represent the Race/Ethnic Background of the child's mother.
6. Check all ethnicities that represent the Race/Ethnic Background of the child's father.

CF Carrier Counseling (continued)

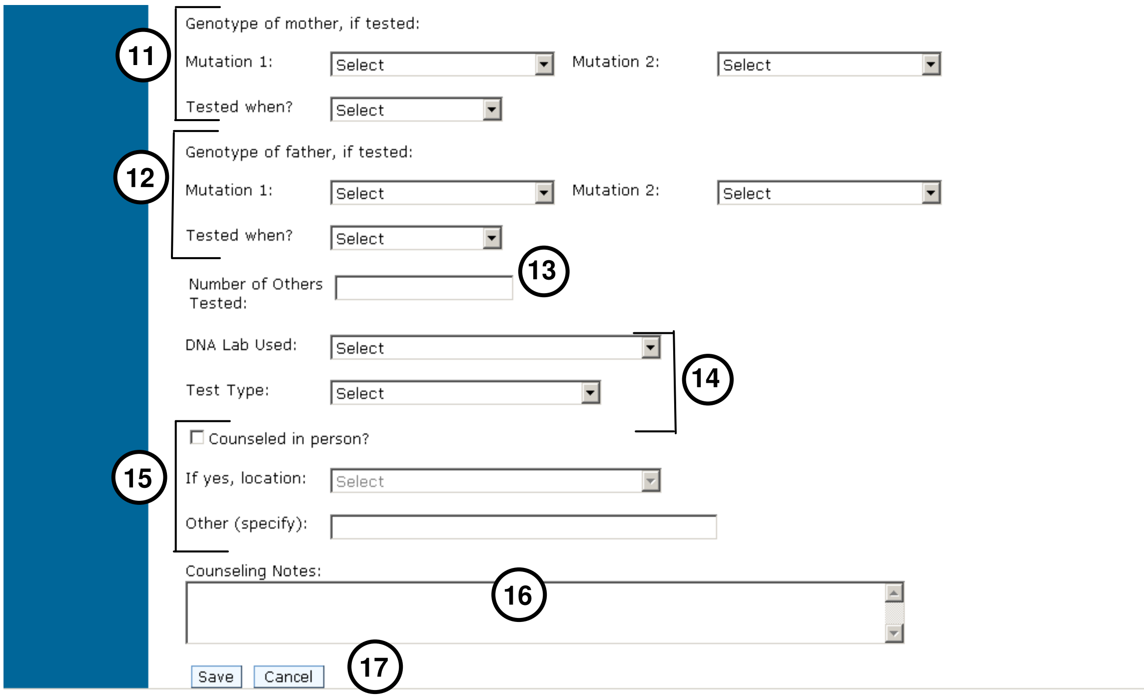
FIGURE 3



7. If applicable, enter any details of the **Family's history of CF, CF carriers and/or CF symptoms** in the blank box.
8. Check all symptoms exhibited by the baby or symptoms to be watched for.
9. If a referral was made, check the **Referral** checkbox, and enter name of person/place to which the referral was made in **Referred To** box.
10. If the patient provided permission for the counselor to contact the baby's doctor, check the **Permission to contact MD** checkbox and enter any other information the counselor should provide when writing to the baby's doctor in the blank box.

CF Carrier Counseling (continued)

FIGURE 4



11. If the child's mother was tested, enter the genotype of the mother in the **Mutation** fields, and select when she was tested.

12. If the child's father was tested, enter the genotype of the father in the **Mutation** fields, and select when he was tested.

13. Enter the number of any other individuals who were tested (e.g. siblings, grandparents).

14. Select the DNA Lab that performed the testing and the type of testing that was done.

15. Check whether the family was counseled in person. If so, then indicate the location at which the family was counseled. If the location does not appear in the specified list, select Other, and enter the name of the location in the **Other (specify)** box.

16. Enter any **Counseling Notes** in the blank box provided.

17. **Buttons**:

    a. **Save:** If any errors are present on the form, they are displayed in red on the screen, and the information will not save until they are corrected. If no errors are present, the screen is refreshed, and the data that was just entered appears on the screen.

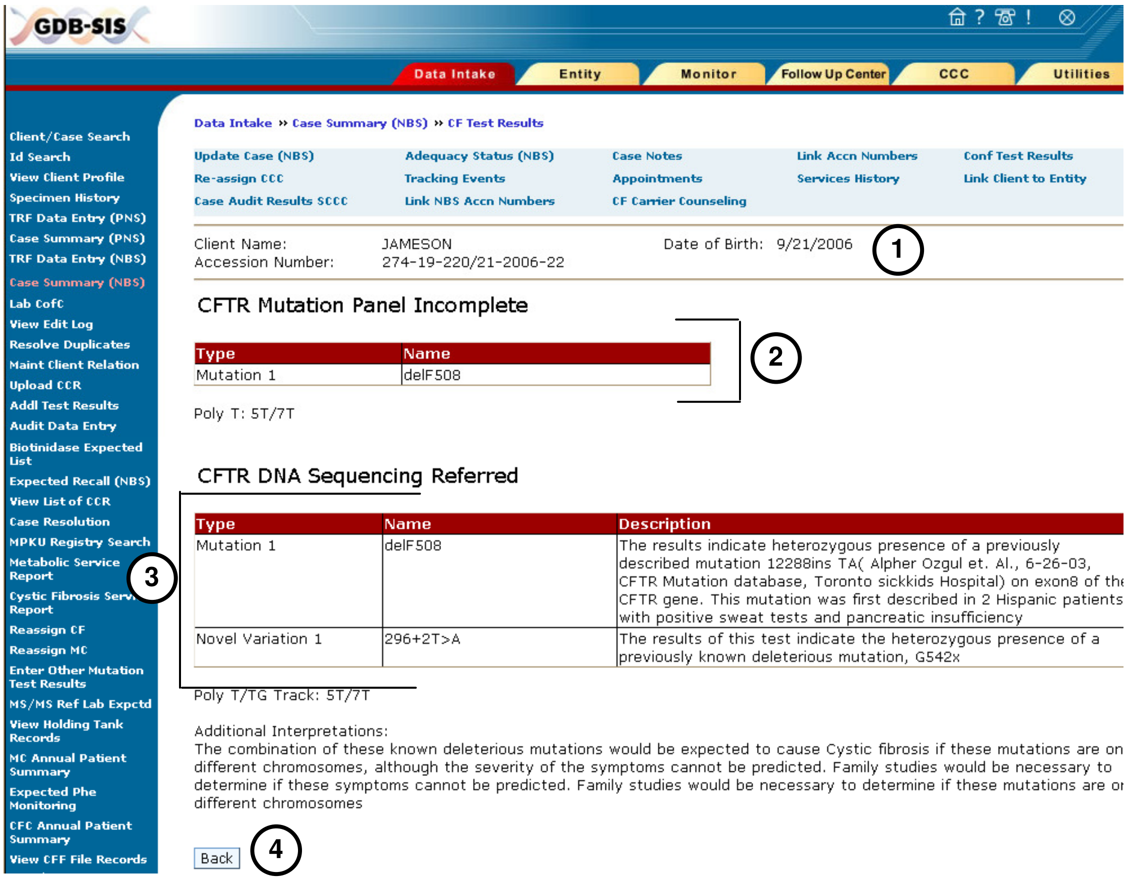
    b. **Cancel:** Refreshes the screen with data that appeared on the screen when it was last saved. Any changed made after the last Save are lost.

CF Test Results

Data Intake >> Case Summary (NBS) >> CF Test Results

This screen is displays the CF Test Results for a newborn screening case. This screen is invoked from the Case Summary (NBS) screen only when CFTR Mutation Panel or CFTR DNA Sequencing Results have been received for the client.

FIGURE 1



1. Displays client and case information in read-only format.
2. Lists the **CFTR Mutation Panel** results received on the case.
3. Lists the **CFTR DNA Sequencing** results received on the case, if applicable.
4. **Buttons**:

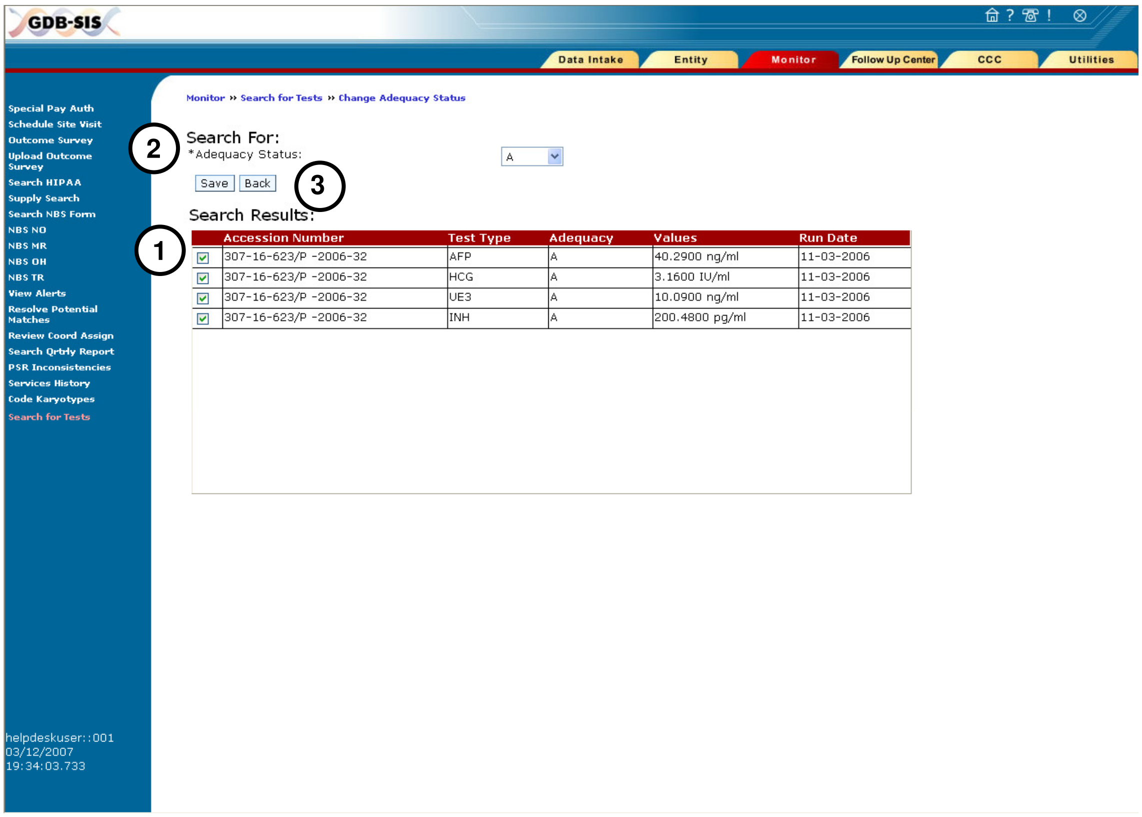
   a. **Back:** Navigates the user back to the Case Summary (NBS) screen populated for the case that appears in the header.

Change Adequacy Status for a Group of Tests

Monitor >> Search for Tests >> Change Adequacy Status

This screen allows the user to change the Adequacy Status for selected tests when there is a suspected problem with a test or group of tests, such as elevated values for an analyte. The user can then change the value of Adequacy status of all selected tests or specimens on this screen.

FIGURE 1



1. **Search Results:** Select the test for which you want to update the Adequacy Status by checking the box next to the Accession Number. Each analyte is listed in a separate row.
2. **Adequacy Status:** This is a required field. Make a selection from the dropdown box and then click **Save**.
3. Click **Back** button to return to previous SIS screen, discarding any information entered.

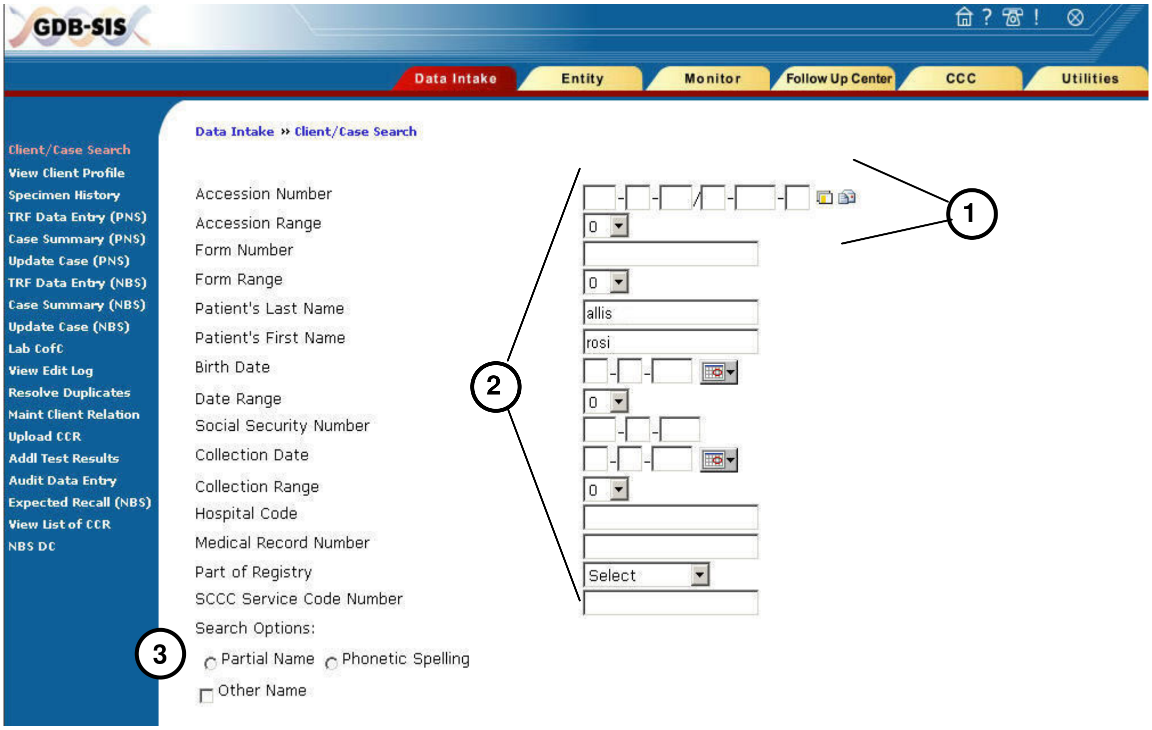
Client/Case Search

Data Intake >> Client/Case Search

This screen allows you to search for an existing Client or a Case Record, or to create a new client. You may search using the Accession Number or Form Number alone, or by entering at least two other search criteria together. The New button will direct you to the Client Profile screen and allow you to create a new client.

Client/Case Search (continued)

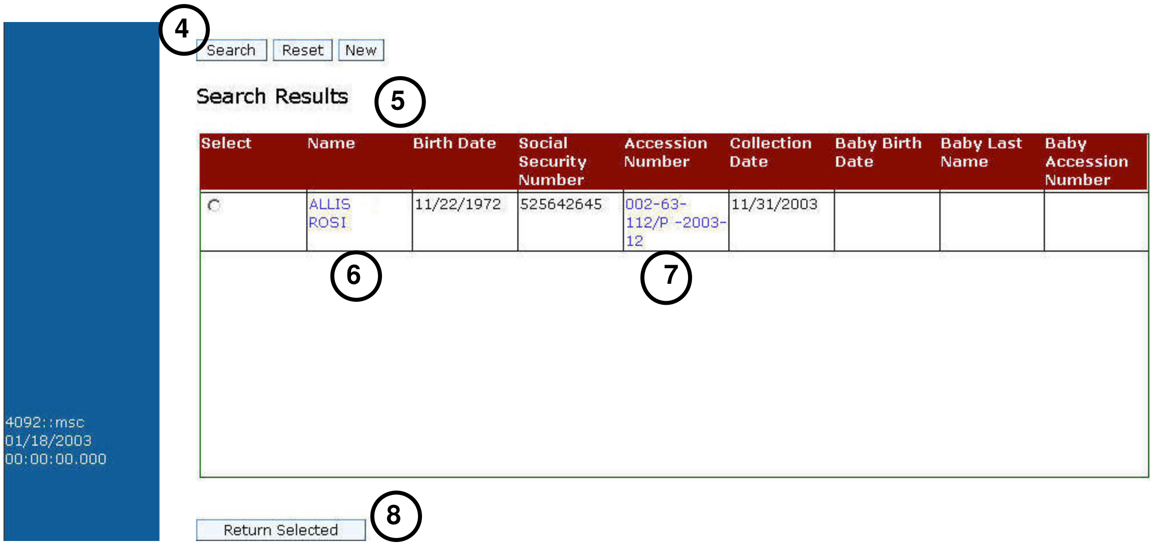
FIGURE 1



1. **Accession Number** or **Form Number** can be used individually as search criteria.
    a. **Accession Range** allows you to specify a range of sequence numbers to return in the search. For example, if “5” is selected, the search will only return accession numbers with a sequence number 5 above, and 5 below your specified accession number.
    b. **Form Range** allows you to specify a range of form numbers to return in the search. For example, if “5” is selected, the search will only return forms with a form number 5 above, and 5 below your specified form number.
2. If neither the Accession Number nor Form Number is available, at least two of the remaining fields must be used together in order to search.
3. **Search Options** allows you to specify the type of search you wish to perform.
    a. **Partial Name** allows you to enter part of a name, and return all matching records.
    b. **Phonetic Spelling** allows you to enter the phonetic spelling of a name, and return all matching records.
    c. **Other Name** allows your search to include both “aliases” and primary name, and return all matching records. An Alias can be entered for a client through the Update Name 3rd level link on the Client Profile screen, which allows you to enter additional names for a client.

Client/Case Search (continued)

FIGURE 2



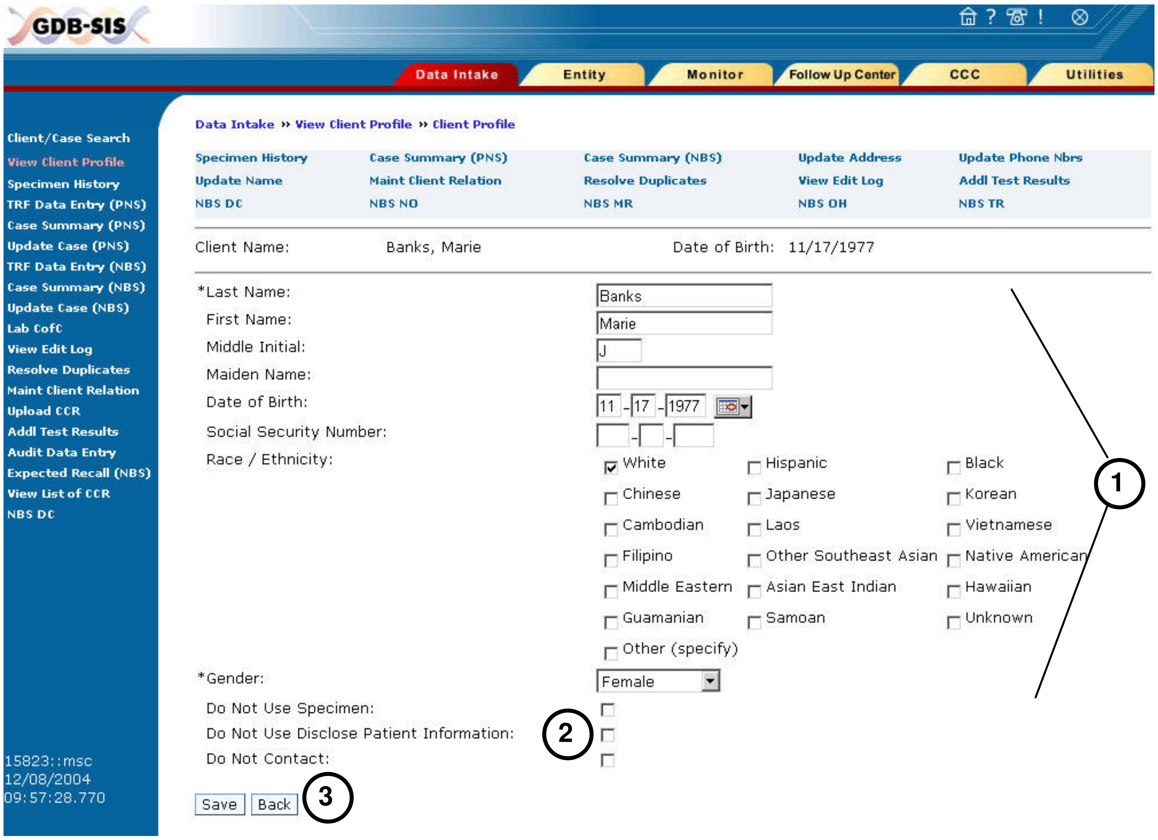
4. **Buttons**:
   a. **Search** button will initiate a search based on the search criteria you have entered.
   b. **Reset** button, when used before you click the Search button, will clear all information from all fields. When used after you have clicked the Search button, the Reset button will clear all search criteria fields, as well as any search results in the Search Results grid.
   c. **New** button will direct you to the Client Profile screen, and allow you to create a new client.
5. **Search Results** grid will display all records that match your search criteria. For PDC, MC, and SCCC users only, the Search Results will only display data related to your job function. For example, PDC users will only be able to view cases that have been referred to their PDC. If the search returns more than 50 results, a warning will display, requiring you to refine your search criteria.
6. Clicking the **Name** link will direct you to the View Client Profile screen.
7. Clicking the **Accession Number** link will direct you to the Case Summary screen.
8. If you have been directed from another screen to the Client / Case Search screen, click the radio button next to the record you want to view, and click the **Return Selected** button. You will be redirected back to the screen you came from, and your selected client / case information will be displayed.

Client Profile

Data Intake >> View Client Profile >> Client Profile

This screen allows you to update an existing Client Profile, or to enter information for a new Client. An existing Client Profile can be edited by clicking the Update button on the View Client Profile screen. A new client can be created by clicking the New button on the **Client** / **Case Search screen.**

Client Profile (continued)



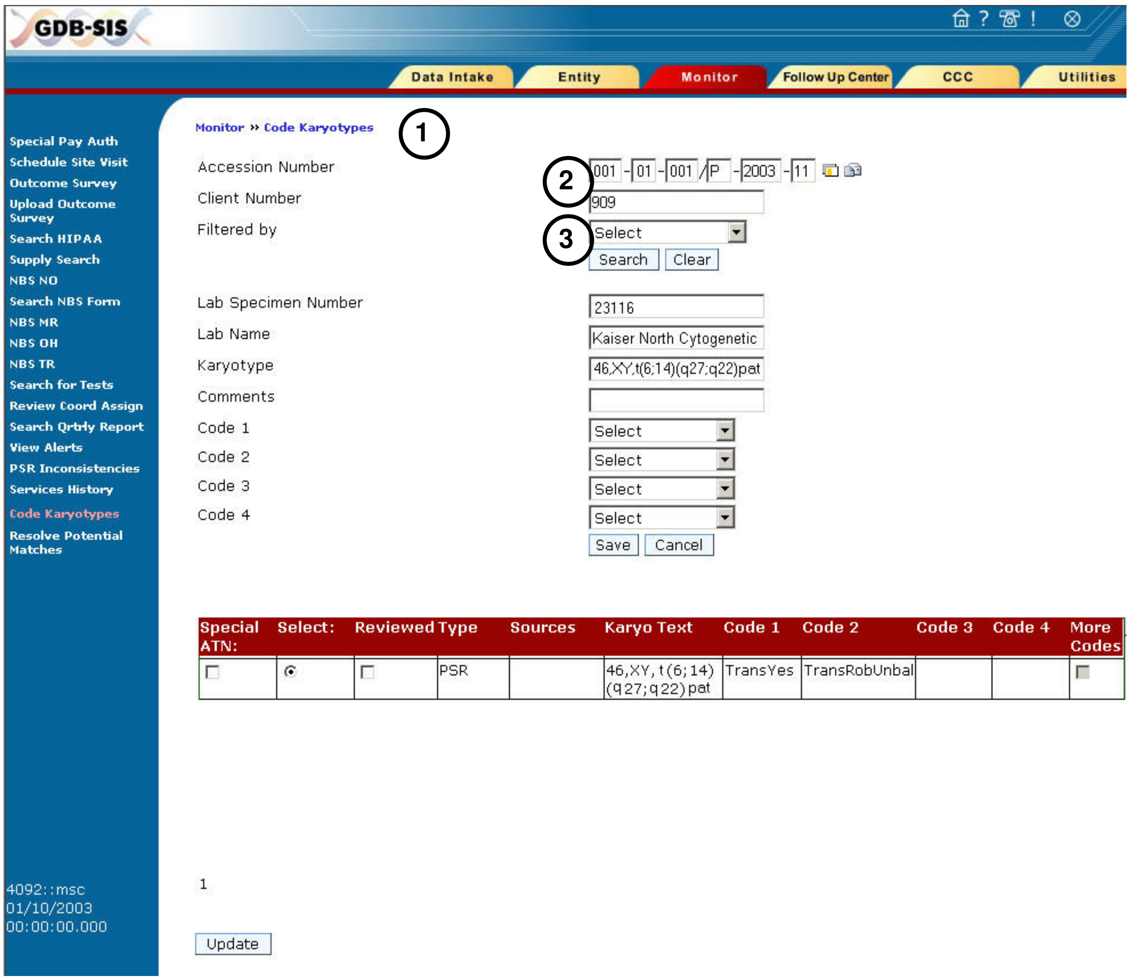
1. Client Information:
   a. When updating an existing client, the **Last Name**, **First Name**, **Middle Initial**, and **Maiden Name** fields will be disabled. Name changes must be performed using the Update Name screen.
   b. When creating a new client, **Last Name**, **Gender**, and one of **First Name**, **Date of Birth**, or **Social Security Number** are required fields.
2. These "Do Not…" boxes are to be selected by the GDB staff only, based on the patient's privacy and disclosure preferences.
3. **Buttons:**
   a. **Save** button will save the data you have entered/updated, and direct you to the View Client Profile screen.
   b. **Back button:** When updating a Client Profile, you will be returned to the View Client Profile screen, without saving any changes. When you are creating a new client, you will be returned to the Client / Case Search screen, without saving any data entered.

Code Karyotypes

Monitor >> Code Karyotypes

The **Code Karyotypes** screen is used to review, recode (if necessary) and approve karyotype codes in SIS. Only the first four karyotype codes are visible on the Code Karyotypes screen.

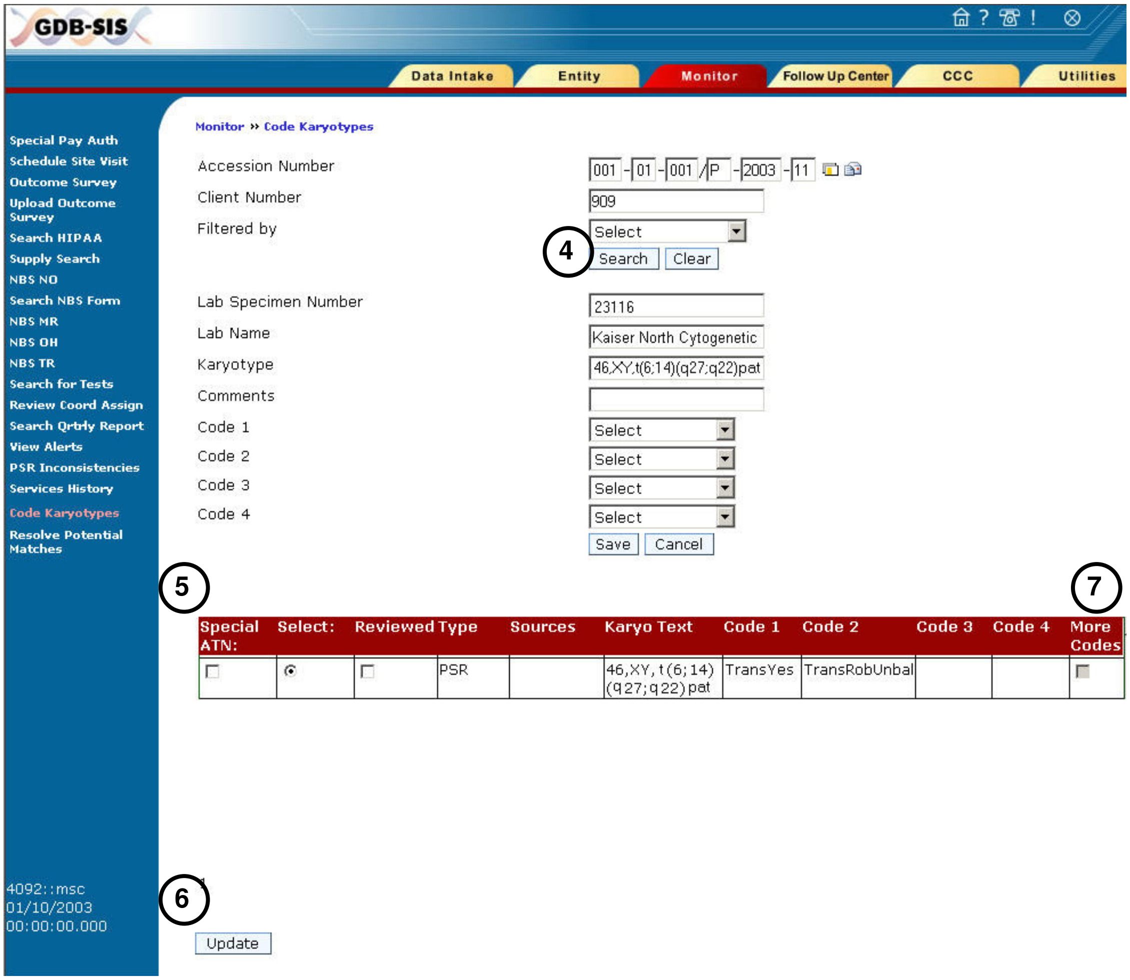
FIGURE 1



1. Navigation and screen name.
2. To search for karyotype information, enter the **Accession Number** and/or **Client Number,** and then click the Search button (see #4).
3. Selecting a value in the **Filtered by** field allows you to filter all karyotypes in the grid by status (All, Reviewed, Not Reviewed, Special Attention).

Code Karyotypes (continued)

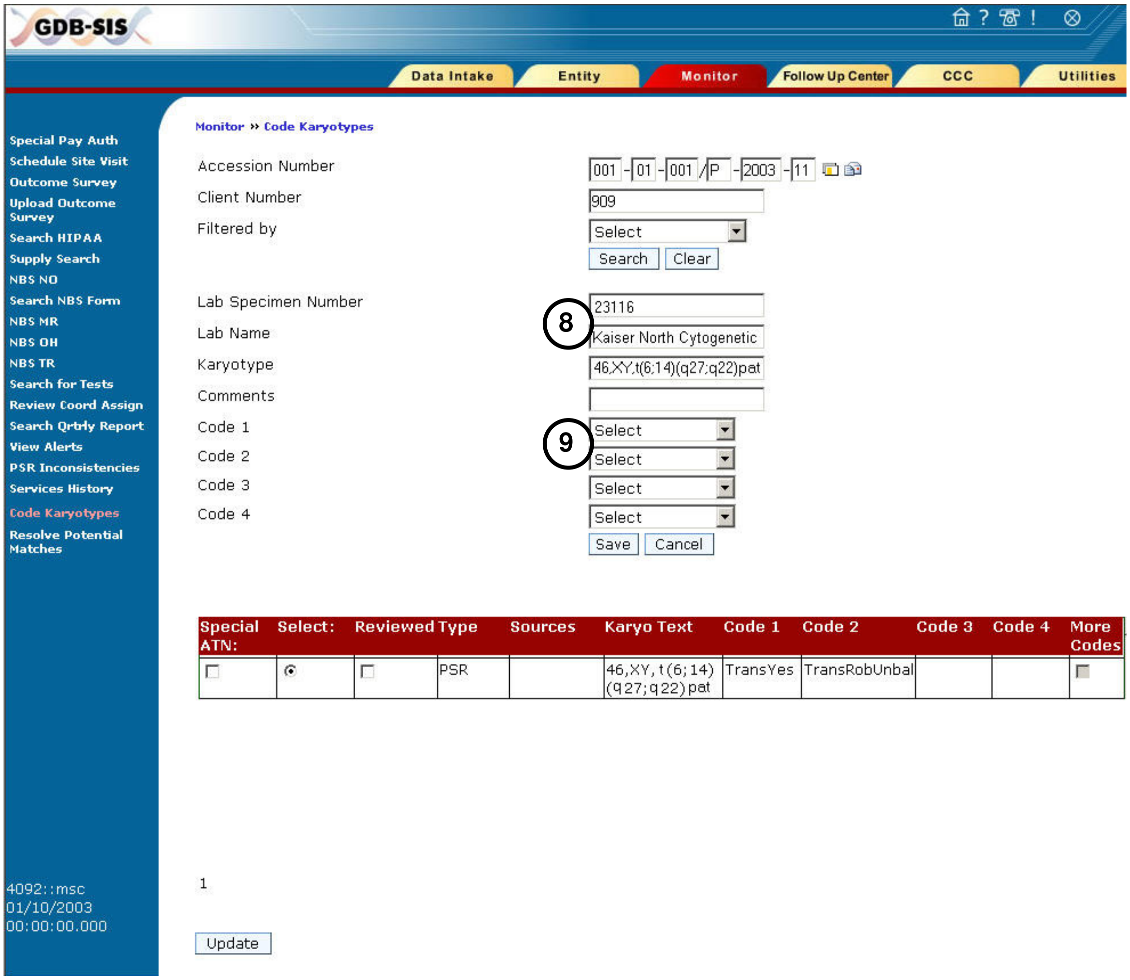
FIGURE 2



4. **Buttons:**
   a. Click the **Search** button to search for karyotypes associated with a specified Accession Number and/or Client Number.
   b. Click the **Clear** button to clear the search criteria specified in the **Filtered by** dropdown.
5. **Karyotype grid** - any karyotypes matching the case to which the Accession Number belongs to, Client Number and filter selection are displayed in the karyotypes grid.
6. To edit the coding for a karyotype, click the radio button in the **Select** column of the karyotypes grid, then click the **Update** button. Additional fields will become available for editing the karyotype codes.
7. The **More Codes** field is a read-only checkbox that will be automatically checked if more than 4 codes exist for a karyotype. These additional codes are not visible in SIS.

Code Karyotypes (continued)

FIGURE 3

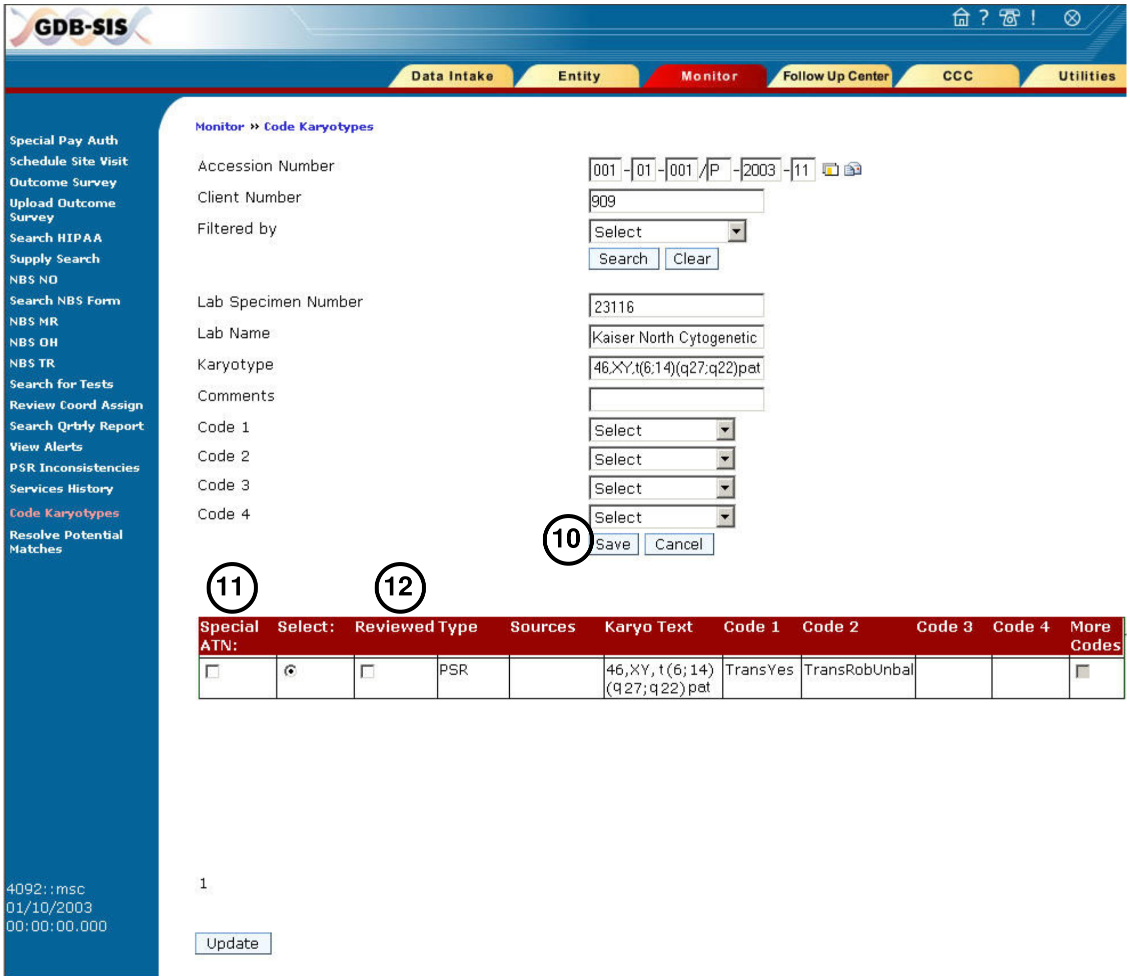


8. Laboratory information is displayed for the selected karyotype.
9. View and modify karyotype and code information in the fields provided. Select from the following values:

Tri2 through Tri22	Turners	Klinefelters
XYY	SexOther	TripleX
Triploidy	Monosomy	Polyploidy
Mosaicism	TransYes	TransDerivative
TransReciprocal	TransRobBal	TransRobUnbal
Additions	Deletions	Duplications
Insertions	Inversions	Rings
Fragile	Dicentric	IsoChrom
Markers		

Code Karyotypes (continued)

FIGURE 4



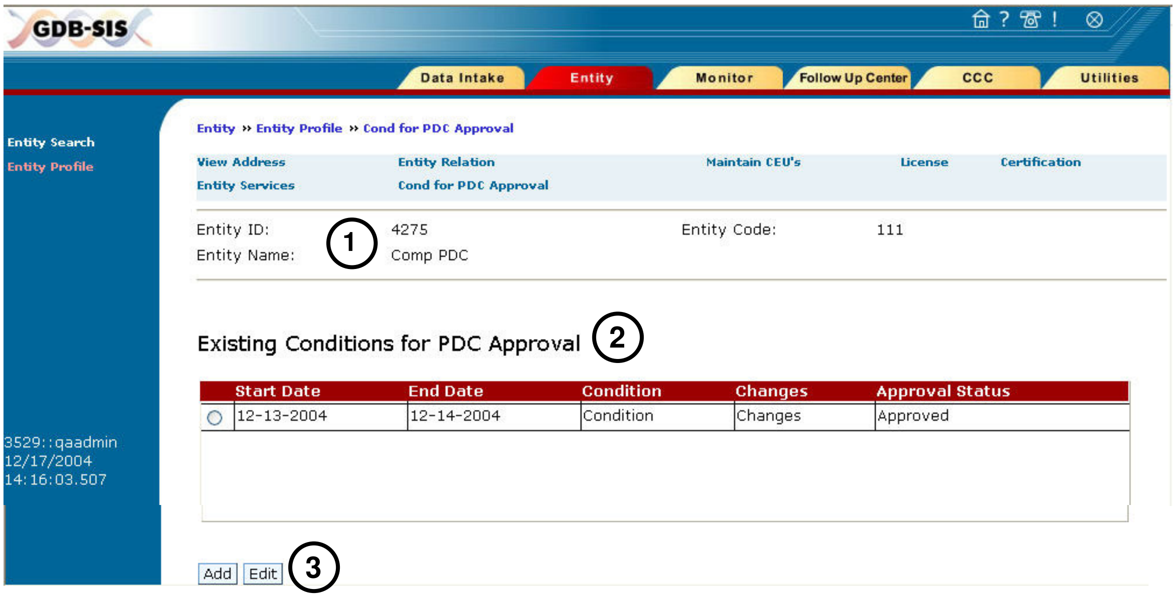
10. **Buttons:**
    a. Click the **Save** button to save the changes you made to the karyotype code information. SIS will then return you to the screen view described in **FIGURE 1**. Any changes made to karyotype codes on this screen will generate an alert to the PDES Registry staff.
    b. Click the **Cancel** button to discard any unsaved karyotype code changes you made. SIS will then return you to the screen view described in **FIGURE 1**.
11. Click the **Special ATN** checkbox to flag the karyotype code for review by a PDES Registry staff member.
12. Click the **Reviewed** checkbox once you are satisfied with the karyotype information you have reviewed and/or edited.

Conditions for PDC Approval

Entity >> Entity Profile >> Cond for PDC Approval

The **Cond for PDC Approval** screen is used to view, create and update conditions a Prenatal Diagnosis Center (PDC) must meet in order to be approved or maintain approval by the GDB. Conditions for PDC approval are only relevant for "PDC-type" entities; however SIS will allow you to enter conditions for approval for any entity type.

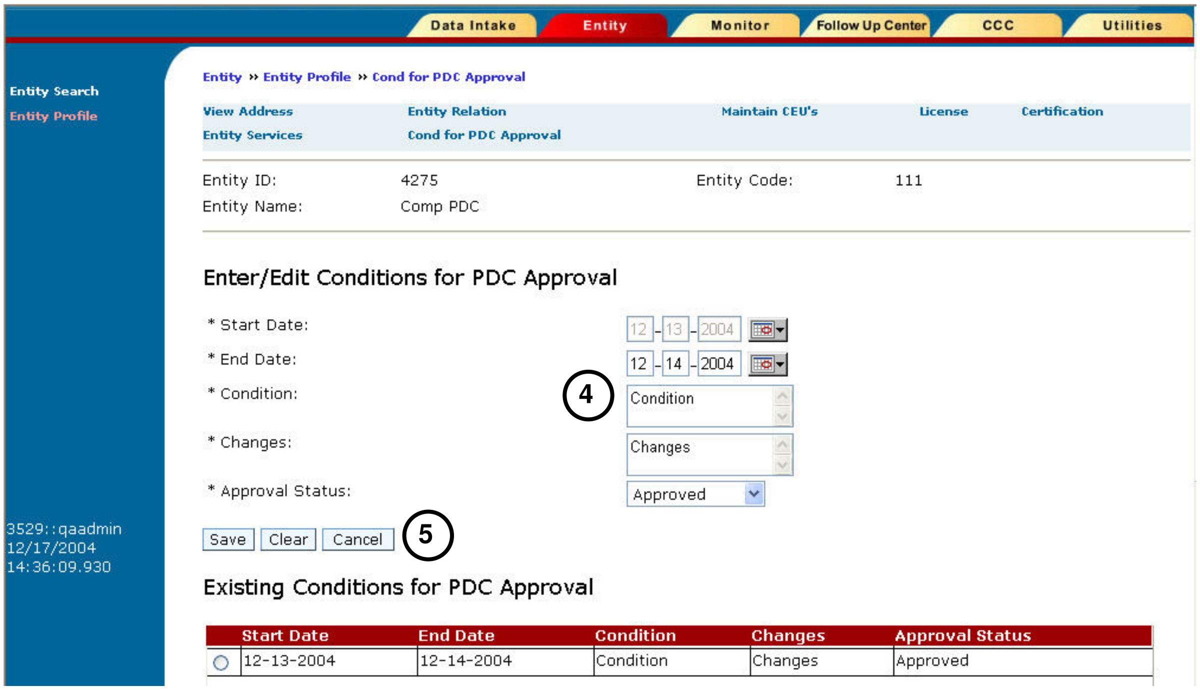
FIGURE 1



1. Information about the case is displayed in a read-only format. To update this information you must use the **Entity Profile** screen.
2. The **Existing Conditions for PDC Approval** grid displays approval conditions that have already been entered.
3. **Buttons:**
    a. Click the radio button next to the condition and then click the **Edit** button to make changes to the selected condition (see **FIGURE 2** below).
    b. Click the **Add** button to add a new condition for the selected entity (see **FIGURE 2** below).

Conditions for PDC Approval (continued)

FIGURE 2



4. Update the existing condition information. **Start Date**, **End Date**, **Condition**, **Changes** and **Approval Status** are required fields. Once you have saved a new condition the **Start Date** will be a read-only field and will not be editable. Please note that dates cannot overlap. If you are adding a new approval condition you will have to edit the existing conditions so that the dates do not overlap.

5. **Buttons:**

   a. Click the **Save** button to save the updated condition record with the information you entered in the fields above.

   b. Click the **Clear** button to clear the information you have entered discarding any unsaved data.

   c. Click the **Cancel** button to discard any unsaved condition information you have entered and return to the previous screen.

   Note: If you click the Add button instead of the Edit button, the fields will be empty. After clicking Save**,** a row will be added to the Existing Conditions for PDC Approval grid.

Consolidate Registry

Data Intake >> View List Of CCR >> Consolidate Registry

The **Consolidate Registry** screen allows you to view registry data that is collected from various sources, and create one consolidated registry record for a selected client in SIS. If the Registry Monitor identifies the registry data as “Reliable” in SIS, then a registry record will be created in the NTD and/or Chromosomal Registries once the Consolidated Registry information has been saved.

In the Header Part of Consolidated screen, we will display all the valid specimens in the case for the Post PEII cases along with Client Name and Date of Birth. For Pre PEII cases, we will only display one valid specimen along with Client Name and Date of Birth.

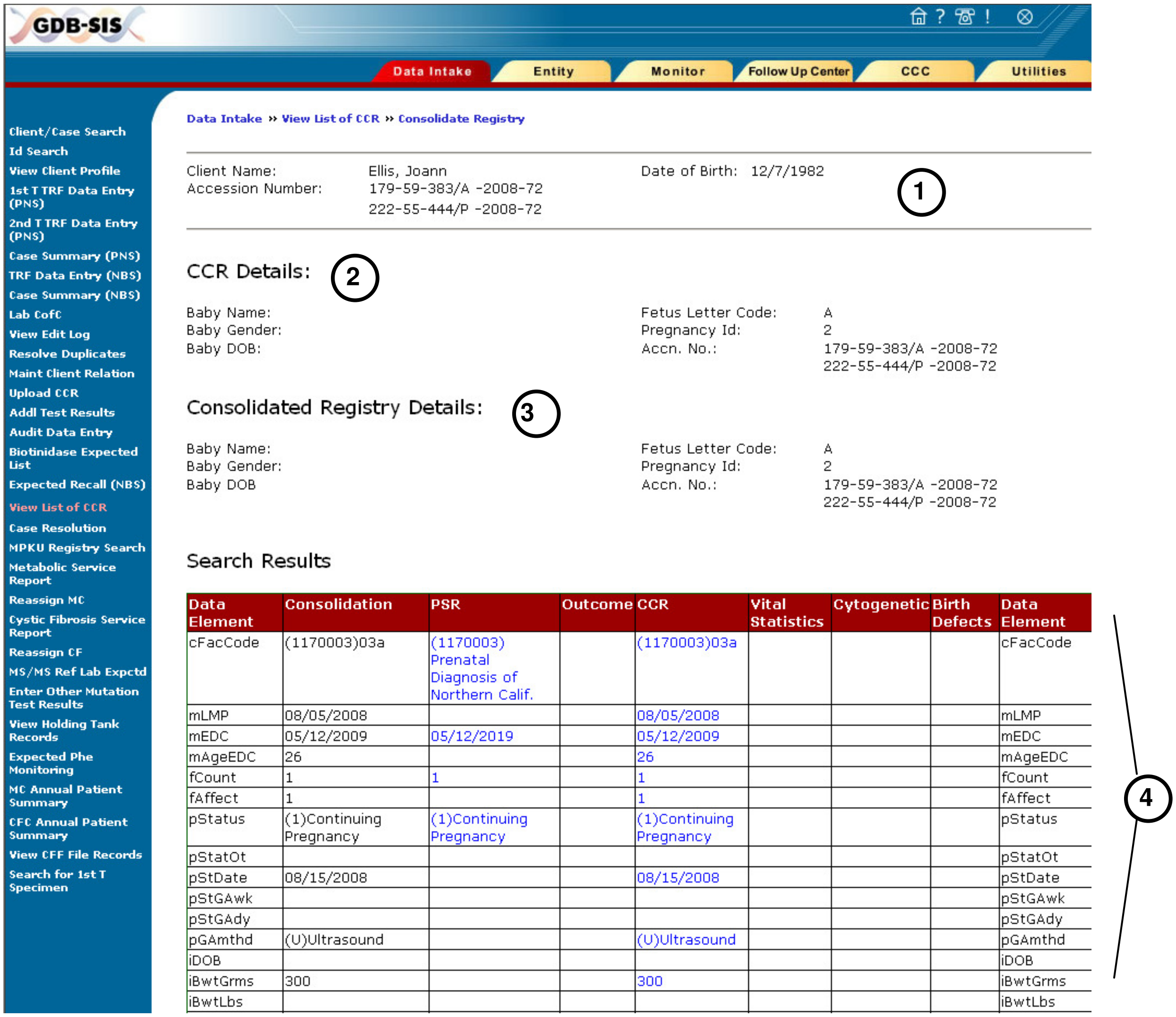
In the CCR and Consolidated registry details section all the valid Accession Numbers associated to the case will be displayed.

A New PSR drop down is added newly to this screen to list all the PSR Ids associated to the selected Accession Number. Selecting a PSR Id and clicking on the ‘Go’ button will load that record in the PSR column of the grid.

The “cdspec” value in the consolidated column will identify whether the Karyotype specimen is CVS or Amnio.

Consolidate Registry (continued)

FIGURE 1

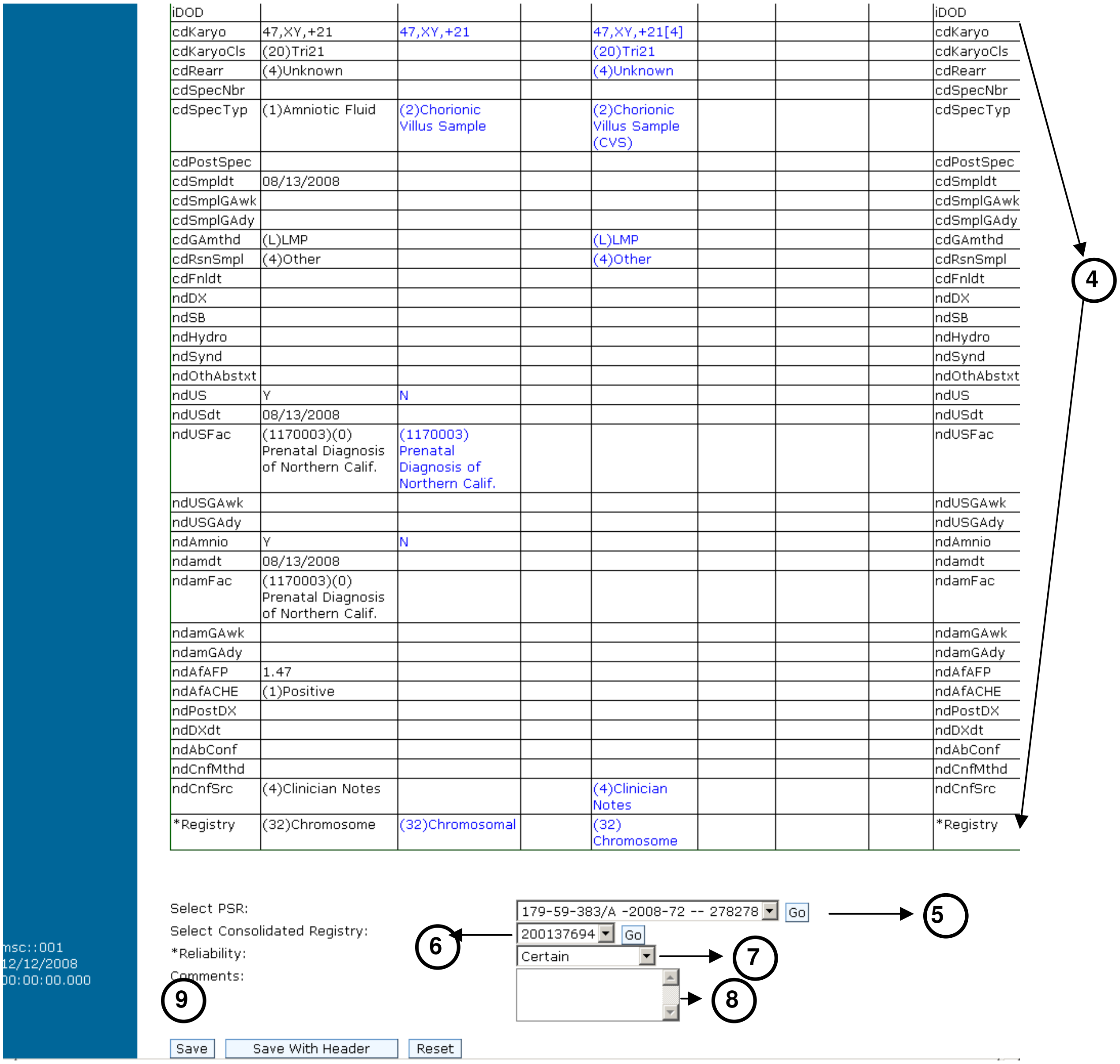


Data Element	Consolidation	PSR	Outcome	CCR	Vital Statistics	Cytogenetic	Birth Defects	Data Element
cFacCode	(1170003)03a	(1170003) Prenatal Diagnosis of Northern Calif.		(1170003)03a				cFacCode
mLMP	08/05/2008			08/05/2008				mLMP
mEDC	05/12/2009	05/12/2019		05/12/2009				mEDC
mAgeEDC	26			26				mAgeEDC
fCount	1	1		1				fCount
fAffect	1			1				fAffect
pStatus	(1)Continuing Pregnancy	(1)Continuing Pregnancy		(1)Continuing Pregnancy				pStatus
pStatOt								pStatOt
pStDate	08/15/2008			08/15/2008				pStDate
pStGAwk								pStGAwk
pStGAdy								pStGAdy
pGAmthd	(U)Ultrasound			(U)Ultrasound				pGAmthd
iDOB								iDOB
iBwtGrms	300			300				iBwtGrms
iBwtLbs								iBwtLbs

1. **Header** section displays the Client Name, Date of Birth and all the valid Accession numbers associated to the selected case.
2. **CCR Details** section displays information about CCR loaded in the search results grid.
3. **Consolidated Registry Details** section displays information about the current consolidated record loaded in the search results grid.
4. **Search Results** grid displays the registry data available from each source. Each cell containing data is a link. Clicking the link will populate the **Consolidation** column for that row, with the data values from the selected source column. For example, clicking “1” from the CCR column will display a “1” in the Consolidation column for the “fCount” row. Clicking on the header of a source column will populate the entire consolidation column with the values from the selected source column.

Consolidate Registry (continued)

FIGURE 2



iDOD								iDOD
cdKaryo	47,XY,+21	47,XY,+21		47,XY,+21[4]				cdKaryo
cdKaryoCls	(20)Tri21			(20)Tri21				cdKaryoCls
cdRearr	(4)Unknown			(4)Unknown				cdRearr
cdSpecNbr								cdSpecNbr
cdSpecTyp	(1)Amniotic Fluid	(2)Chorionic Villus Sample		(2)Chorionic Villus Sample (CVS)				cdSpecTyp
cdPostSpec								cdPostSpec
cdSmpldt	08/13/2008							cdSmpldt
cdSmplGAwk								cdSmplGAwk
cdSmplGAdy								cdSmplGAdy
cdGAmthd	(L)LMP			(L)LMP				cdGAmthd
cdRsnSmpl	(4)Other			(4)Other				cdRsnSmpl
cdFnldt								cdFnldt
ndDX								ndDX
ndSB								ndSB
ndHydro								ndHydro
ndSynd								ndSynd
ndOthAbstxt								ndOthAbstxt
ndUS	Y	N						ndUS
ndUSdt	08/13/2008							ndUSdt
ndUSFac	(1170003)(0) Prenatal Diagnosis of Northern Calif.	(1170003) Prenatal Diagnosis of Northern Calif.						ndUSFac
ndUSGAwk								ndUSGAwk
ndUSGAdy								ndUSGAdy
ndAmnio	Y	N						ndAmnio
ndamdt	08/13/2008							ndamdt
ndamFac	(1170003)(0) Prenatal Diagnosis of Northern Calif.							ndamFac
ndamGAwk								ndamGAwk
ndamGAdy								ndamGAdy
ndAfAFP	1.47							ndAfAFP
ndAfACHE	(1)Positive							ndAfACHE
ndPostDX								ndPostDX
ndDXdt								ndDXdt
ndAbConf								ndAbConf
ndCnfMthd								ndCnfMthd
ndCnfSrc	(4)Clinician Notes			(4)Clinician Notes				ndCnfSrc
*Registry	(32)Chromosome	(32)Chromosomal		(32) Chromosome				*Registry

5. **Select PSR** drop down section displays all the PSR Ids of the PSR's available for the client. This drop down will be visible only when PSR's is present for a client.
6. **Select Consolidated Registry** drop down section displays all the registry Ids associated with the client. This drop down will be visible only when registry Ids are present for a particular client.
7. **Reliability** of the registry data is a required field. The Registry Monitor must choose from the following Reliability options prior to Saving the Consolidated Registry form: Certain, Probable, Tentative, Not a Case.

Consolidate Registry (continued)

8. **Comments** is a free form field. You may enter any comments for the consolidated CCR.
9. **Buttons:**
   a. **Save** button creates a registry record in the NTD and/or Chromosomal Registry when “Certain” is selected for the **Reliability** field. If one of the other three reliability values is selected, the consolidated data is saved in SIS, but no registry record is created.
   b. Save with Header button will save the data in the consolidated column along with the header details. CCR header details are copied to the Consolidated registry details.
   c. **Reset** button reloads the screen and clears the information in the **Consolidated** column

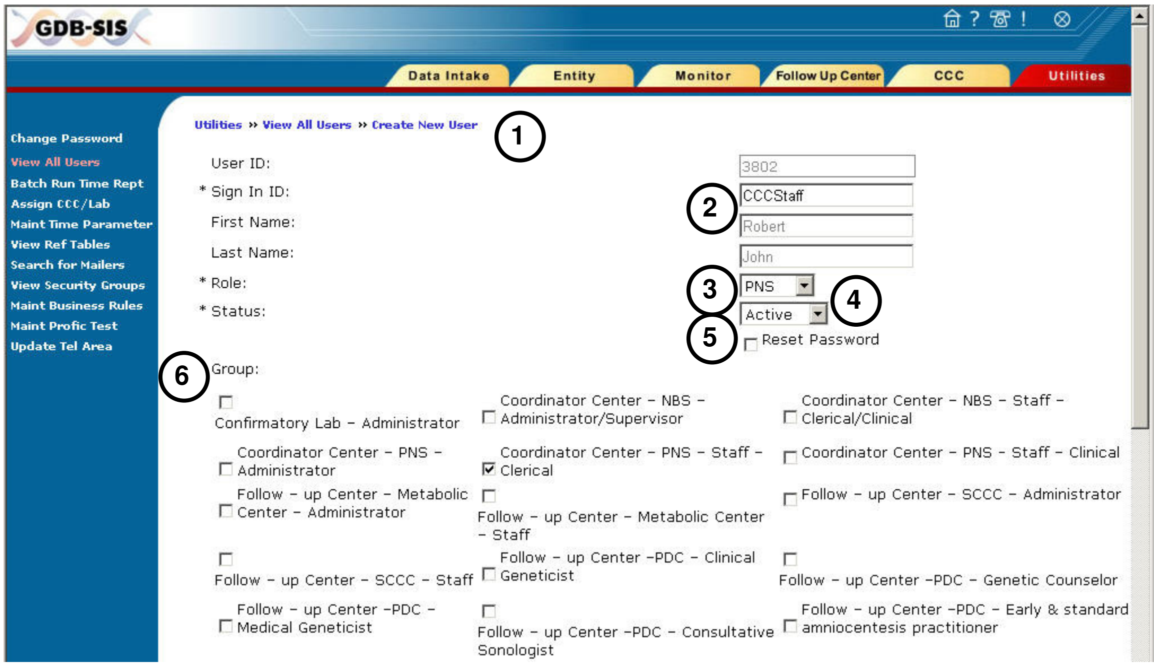
Create New User

Utilities >> View All Users >> Create New User

Entity >> Entity Profile >> Create New User

The **Create New User** screen is used to create a new user in SIS and to update information about a user who has already been created, including the user's Sign In ID, Role, Status, and Security Group membership. To create a new user record, use the Entity Relation screen and click the **Create New User** button.

FIGURE 1



1. Navigation and screen name.
2. **Sign In ID** is a required field denoted by the (*)
3. **Role** is a required field denoted by the (*)
4. **Status** ("PNS", "NBS" or "Both") is a required field denoted by the (*)
5. You can reset a user's password (reverts to the same as the Sign In ID) by clicking the **Reset Password** checkbox.
6. Group section indicates the SIS security groups to which the user belongs. Membership in a group is indicated by a checkmark in the box next to the group name. You can add or delete group membership to one or more group from this screen.

Create New User (continued)

FIGURE 2

7. **Buttons**:
   a. **Save** updates an existing user profile.
   b. **Back** returns the user to the View All Users screen discarding any changes that have not been saved in the Create New User screen.

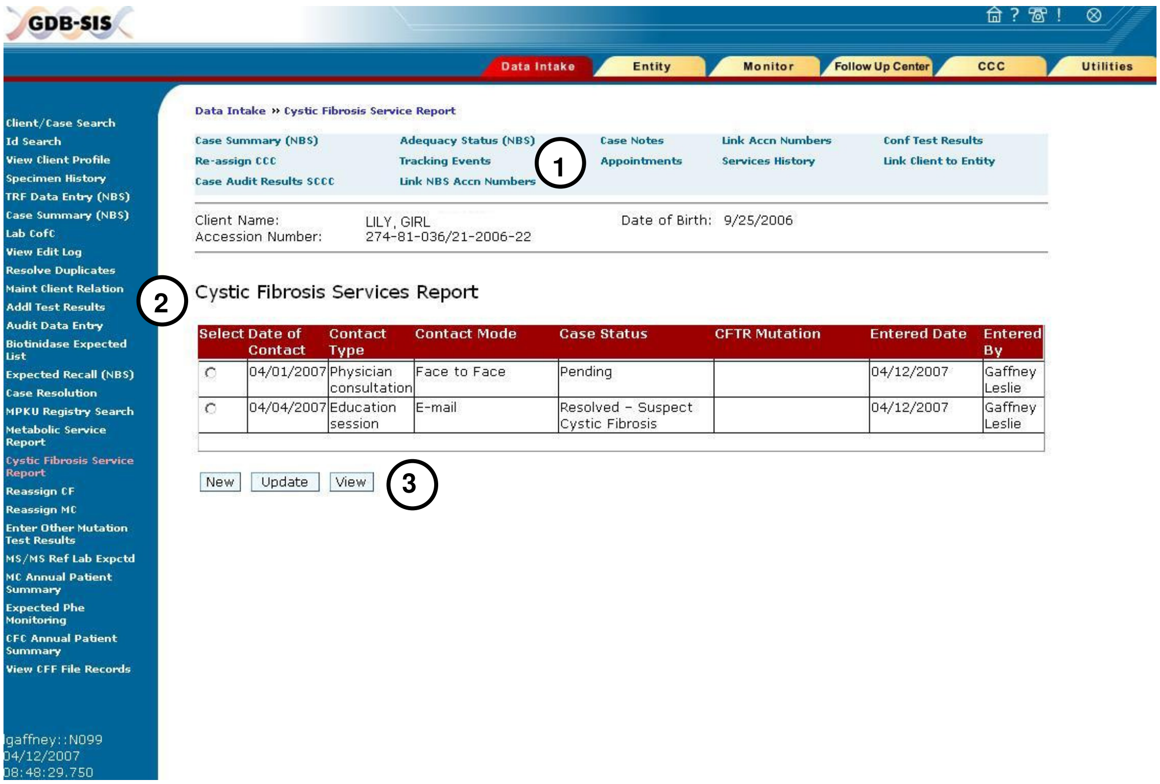
Note: To update an existing user, navigate to the **View All Users** screen, click the radio button next to a user record and then click the **Update** button.

Cystic Fibrosis Service Report

Data Intake >> Cystic Fibrosis Service Report

The Cystic Fibrosis Service Report screen will be used to capture services provided at the Cystic Fibrosis Centers up until the point at which the child is diagnosed. All further follow-up will then be captured in the Annual Patient Summary screen. A 3rd level link to Case Notes is available in this screen allowing entry of additional information on the patient encounter.

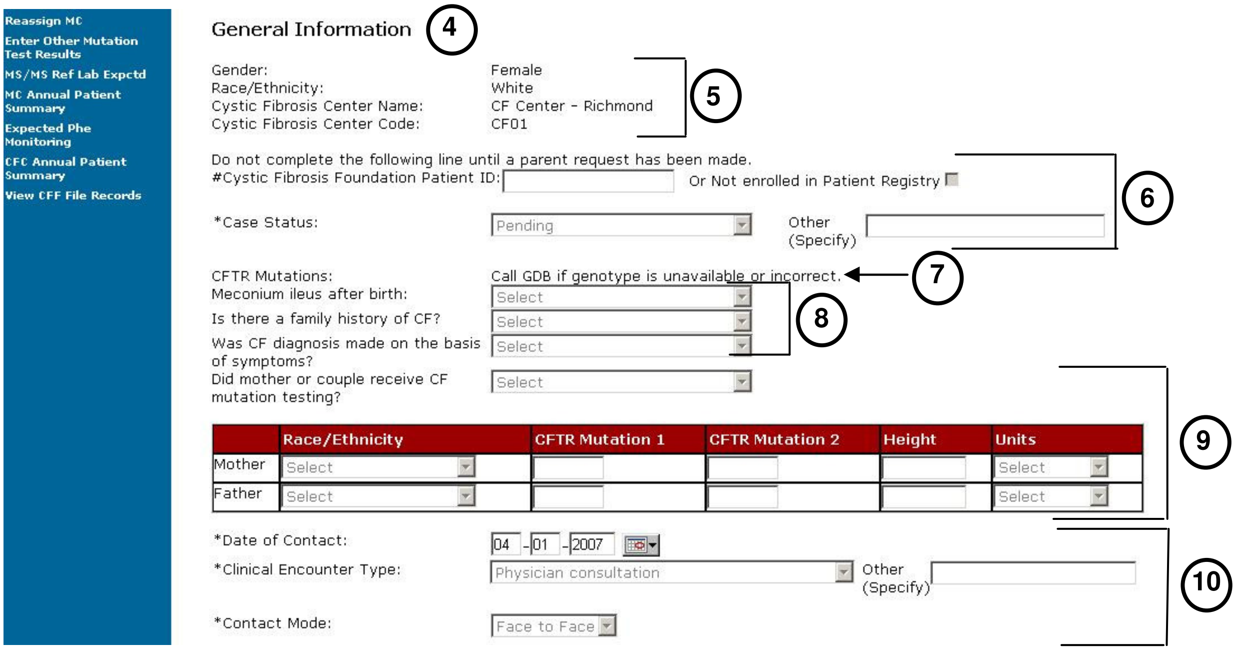
FIGURE 1



1. Displays client and case information in read-only format.
2. Lists all CFSRs that have been completed for the client in the grid. Use the **Select** radio button to indicate the specific report to be displayed.
3. **Buttons**:
   a. **New:** Displays a new, blank CFSR form for the patient.
   b. **Update:** Displays the CFSR selected in the grid in update mode.
   c. **View:** Displays the CFSR selected in the grid in read-only mode

Cystic Fibrosis Service Report (continued)

FIGURE 2



4. **General Information**: Displays and captures general information about the patient including demographic information, family history of CF and high-level information regarding the contact with the patient.

5. This read-only area displays client information and the CF center completing the report.

6. Either enter the CFF Patient ID for the client, or check that the child's guardian requested that the child not be enrolled in Patient Registry. Enter the **Case Status**, unless the field has been disabled because the case is in Update or View mode.

7. Displays a list of the mutations that the baby screened positive for in the **CFTR Mutations** field.

8. Enter details about the baby's birth.

   a. Select whether the baby had **Meconium Ileus after birth**.

   b. Select whether the family has a history of CF.

   c. Select whether the CF diagnosis was made based on the symptoms that the child presented.

9. Select whether the baby's mother or father were tested for CF mutations. If they were, complete the grid that follows: (Note that these values will default from the last CFSR completed for the patient)

   a. Select primary **Race**/**Ethnicity** of the child's parent from the dropdown list in the grid.

   b. Enter the mutations that the parent tested positive for in the **CFTR Mutation 1** and **Mutation 2** fields.

Cystic Fibrosis Service Report (continued)

c. Enter the parent's **Height** and select the **Unit** of measurement from the dropdown list in the grid.

10. Enter details of the contact with the patient that is being documented in the CFSR. These are required fields. Required fields are denoted by (*).

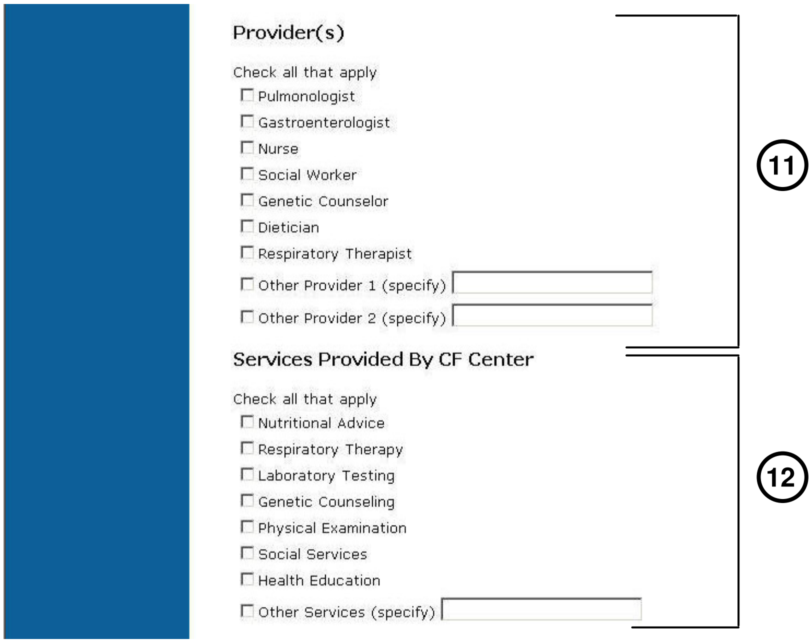
a. Enter the **Date of Contact**. If desired, use the calendar icon to select the date.

b. Select the type of encounter from the **Clinical Encounter Type** dropdown box. If the encounter was not one of those listed in the drop down list, select **Other**, and specify the type of encounter in the blank box that follows.

c. Select the **Contact Mode** from the dropdown box.

Cystic Fibrosis Service Report (continued)

FIGURE 3

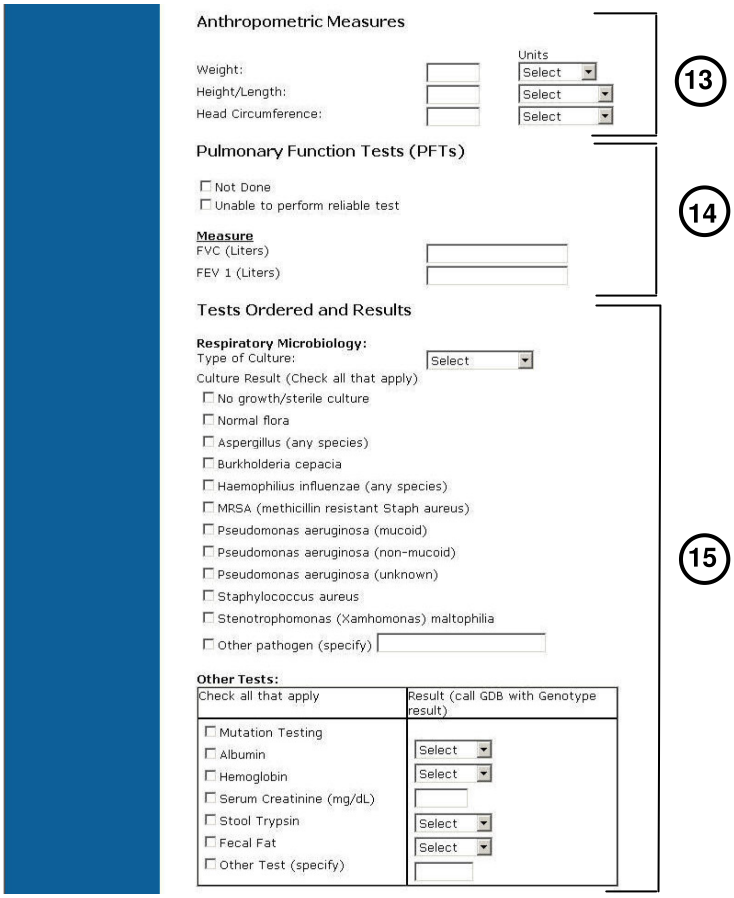


11. Check the types of providers who provided services to the patient. If providers other than those listed on the screen conducted services, check the first available **Other Provider** checkbox, and specify the type of provider in the blank box that follows.

12. Check the services that were provided to the patient. If services other than those listed on the screen were provided, check the **Other Services** checkbox, and specify the details of the service in the blank box that follows.

Cystic Fibrosis Service Report (continued)

FIGURE 4



13. Enter the **Anthropometric Measures** for the patient.
    a. Enter the child's **Weight** and select the **Unit** of measurement from the drop down list.
    b. Enter the child's **Height/Length** and select the **Unit** of measurement from the drop down list.
    c. Enter the child's **Head Circumference** and select the **Unit** of measurement from the drop down list.
14. Enter the details of **Pulmonary Function Test(s)** conducted on the patient.
    a. If PFTs were not done, check whether they were not provided because they were not done, or because they could not be done reliably.
    b. If PFTs were done, enter the **FVC** and **FEV 1** values in the blank boxes.
15. **Tests Ordered and Results:** Captures all of the tests that were ordered on the patient and their results.

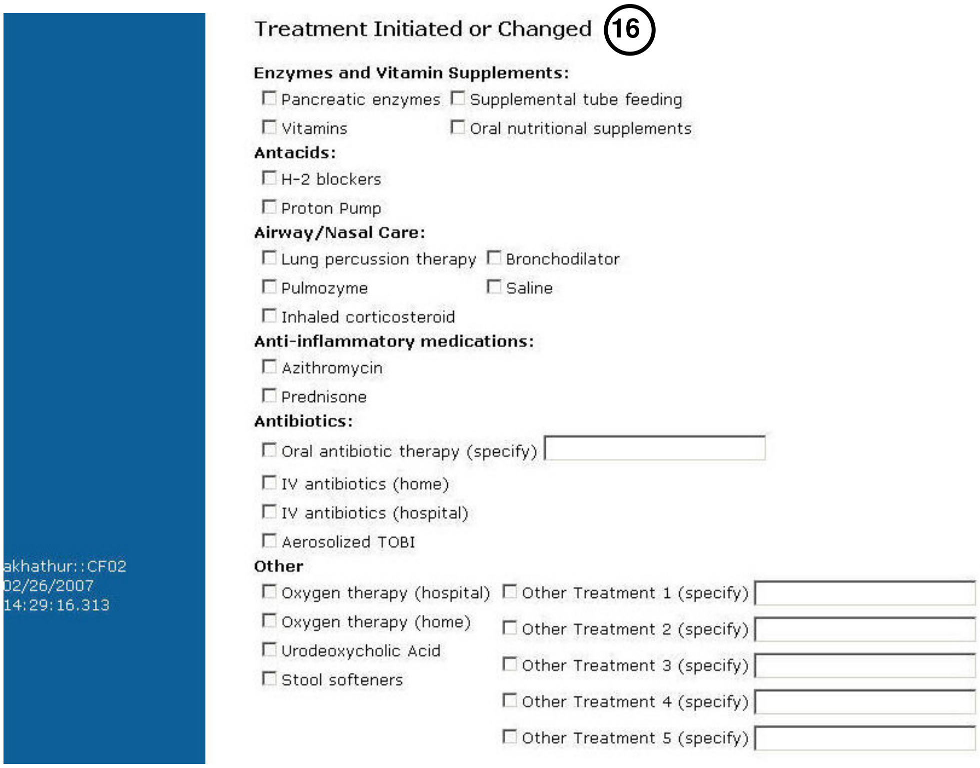
Cystic Fibrosis Service Report (continued)

a. If a culture was taken, select the **Type of Culture** that was taken from the dropdown list. Check all of the results of the culture. If results other than those listed on the screen were identified, check the **Other pathogen** checkbox, and specify the type of pathogen in the blank box that follows.

b. If other tests were taken, check all of the tests that were taken and enter or select the appropriate test results. If tests other than those listed on the screen were taken, check the **Other Test** checkbox, and specify the type of test in the blank box that follows.

Cystic Fibrosis Service Report (continued)

FIGURE 5



akhathur::CF02
02/26/2007
14:29:16.313

Treatment Initiated or Changed 16

Enzymes and Vitamin Supplements:
☐ Pancreatic enzymes ☐ Supplemental tube feeding
☐ Vitamins ☐ Oral nutritional supplements

Antacids:
☐ H-2 blockers
☐ Proton Pump

Airway/Nasal Care:
☐ Lung percussion therapy ☐ Bronchodilator
☐ Pulmozyme ☐ Saline
☐ Inhaled corticosteroid

Anti-inflammatory medications:
☐ Azithromycin
☐ Prednisone

Antibiotics:
☐ Oral antibiotic therapy (specify)
☐ IV antibiotics (home)
☐ IV antibiotics (hospital)
☐ Aerosolized TOBI

Other
☐ Oxygen therapy (hospital) ☐ Other Treatment 1 (specify)
☐ Oxygen therapy (home) ☐ Other Treatment 2 (specify)
☐ Urodeoxycholic Acid ☐ Other Treatment 3 (specify)
☐ Stool softeners ☐ Other Treatment 4 (specify)
☐ Other Treatment 5 (specify)

16. **Treatment Initiated or Changed:** Captures all of the treatments that have been prescribed to the patient.

    a. Check all **Enzymes and Vitamin Supplements** that were prescribed to the patient.

    b. Check all **Antacids** that were prescribed to the patient.

    c. Check all **Airway/Nasal Care** treatments that were prescribed to the patient.

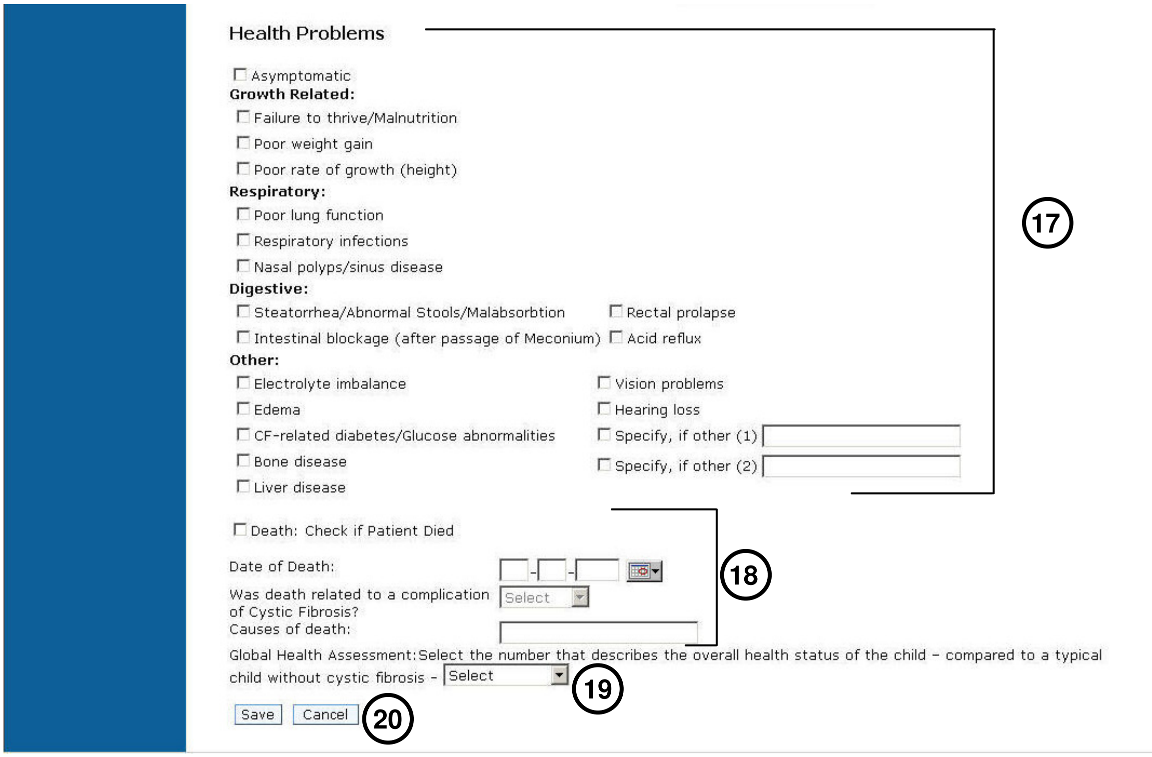
    d. Check all **Anti-inflammatory medications** that were prescribed to the patient.

    e. Check all **Antibiotics** that were prescribed to the patient.

    f. Check all **Other** treatments that were prescribed to the patient. If treatments other than those listed on the screen were performed, check the first available **Other Treatment** checkbox, and specify the type of treatment in the blank box that follows.

Cystic Fibrosis Service Report (continued)

FIGURE 6



17. **Health Problems:** Captures all health problems that were experienced by the patient.
    a. If the patient had no health problems, check the **Asymptomatic** checkbox.
    b. Check all **Growth Related** health problems experienced by the patient.
    c. Check all **Respiratory** health problems experienced by the patient.
    d. Check all **Digestive** health problems experienced by the patient.
    e. Check all **Other** health problems experienced by the patient. If health problems other than those listed on the screen were experienced by the patient, check the first available **Other** checkbox, and specify the type of problem in the blank box that follows.
18. If the patient has died, check the **Death** checkbox, and indicate the details of the death.
    a. Enter the **Date of Death**. If desired, use the date calendar.
    b. Select whether the death was related to a complication of CF.
    c. Enter the **Causes of death**.
19. Select a number from the **Global Health Assessment** dropdown box that indicates overall health status of the child when compared to a child without cystic fibrosis.

Cystic Fibrosis Service Report (continued)

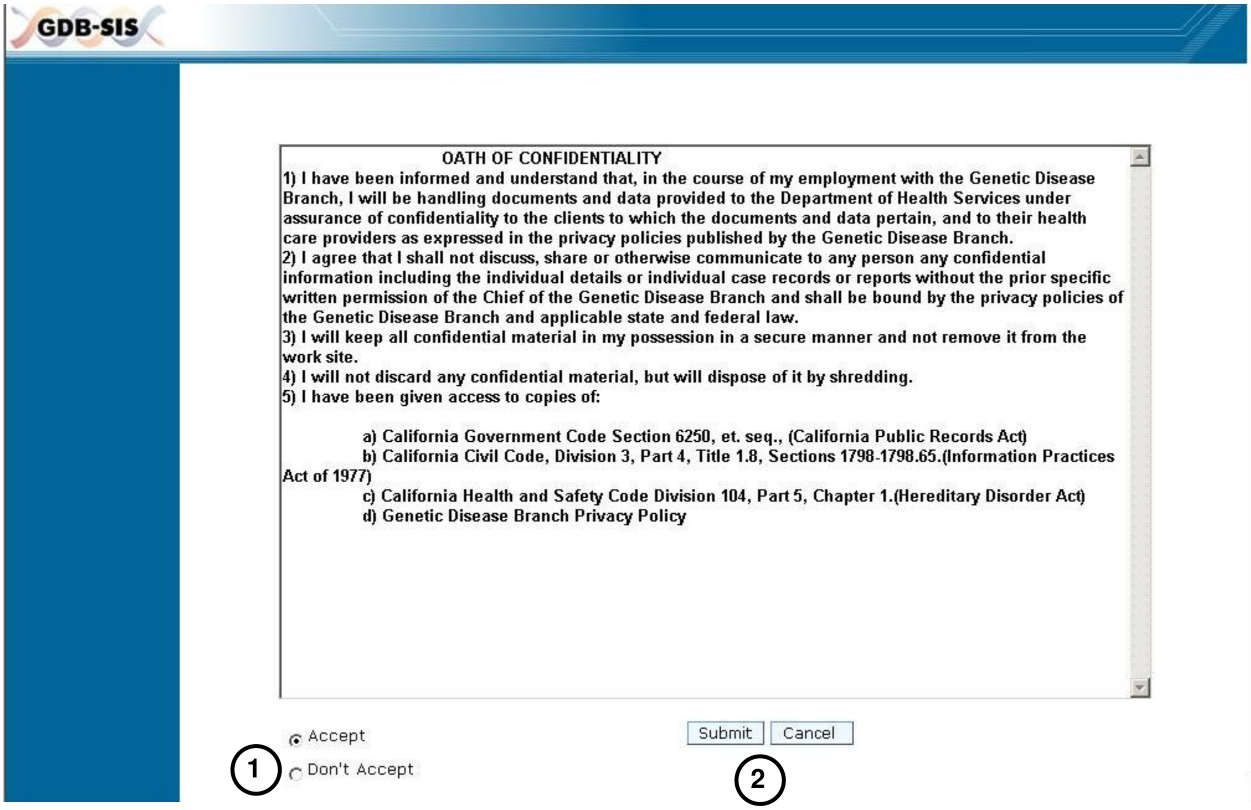
20. **Buttons:**

    a. **Save:** If any errors are present on the form, they are displayed in red on the screen, and the information will not save until they are corrected. If no errors are present, the detailed form is closed, and the new or updated CFSR appears in the **Cystic Fibrosis Services Report** grid that is displayed.

    b. **Cancel:** Closes the detailed form without saving the changes.

Disclosure

When you log into SIS for the first time, you will be asked to read and accept an Oath of Confidentiality. You will not be able to access SIS if you do not accept.



1. Read the Oath of Confidentiality and choose either “Accept” or “Don’t Accept” using the radio buttons.
2. **Buttons:**
   a. **Submit** button will send your response to SIS, and allow you to access SIS if you have selected “Accept”.
   b. **Cancel** will return you to the SIS login homepage.

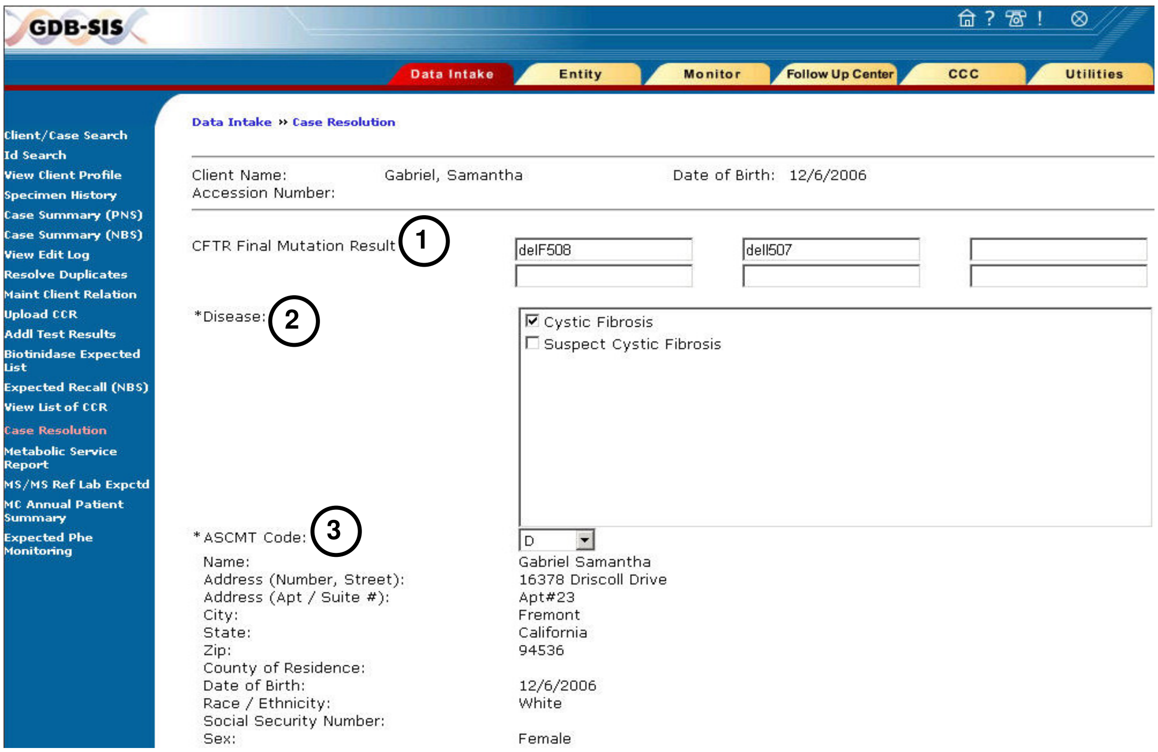
Enter Case Resolution – Non-Screened

Data Intake >> Case Resolution

This screen enables users to enter diagnosis information for a non-screened client. This allows non-screened clients to be entered into SIS so that these clients can be submitted to the Registry by the PDES Monitor.

The portion of the screen related to test resolution and the Test Determination grid will not appear for these cases. Disease diagnosis can be entered, but it will not be associated with any testing.

FIGURE 1



1. **CFTR Final Mutation Result:** Cystic Fibrosis test result mutations can be manually entered here.
2. **Disease:** Select the checkbox that is applicable.
3. **ASMT Code:** Select a code from dropdown box:

   A = Screened and identified through the NBS program.

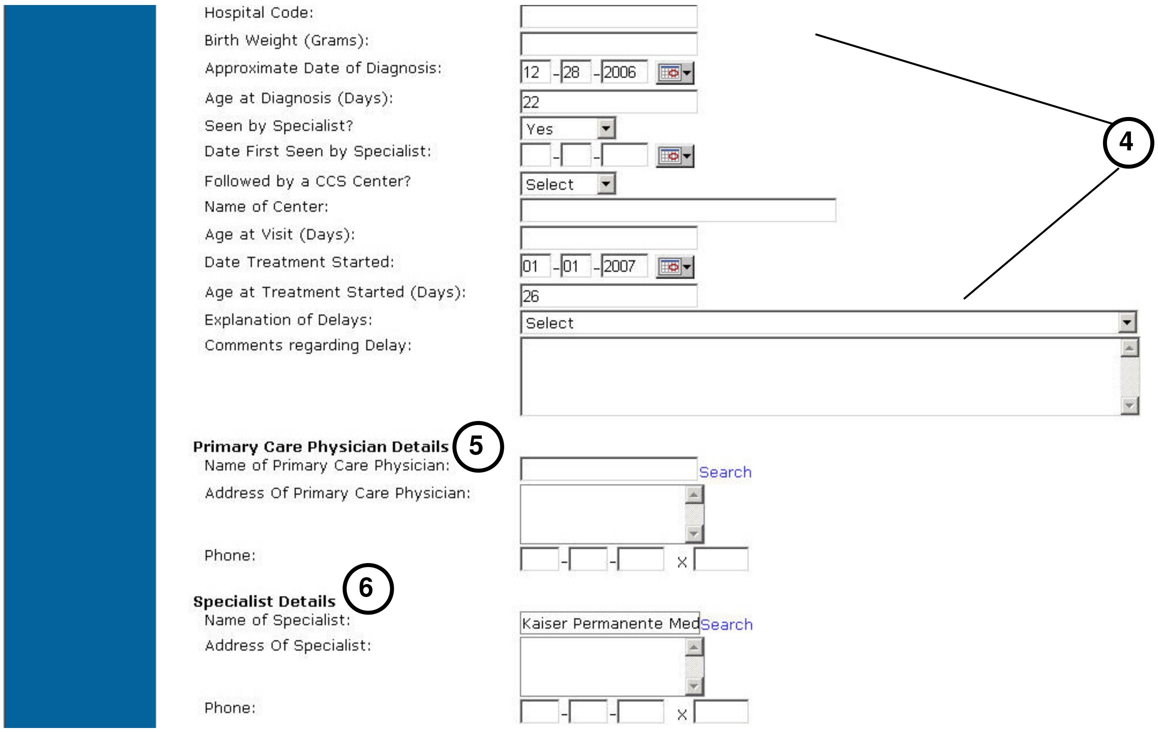
   B = Born in California, but not identified through the NBS program (for a variety of reasons)

   C = Born outside of California.

   D = Screened through California and NBS and missed.

Enter Case Resolution - Non-Screened (continued)

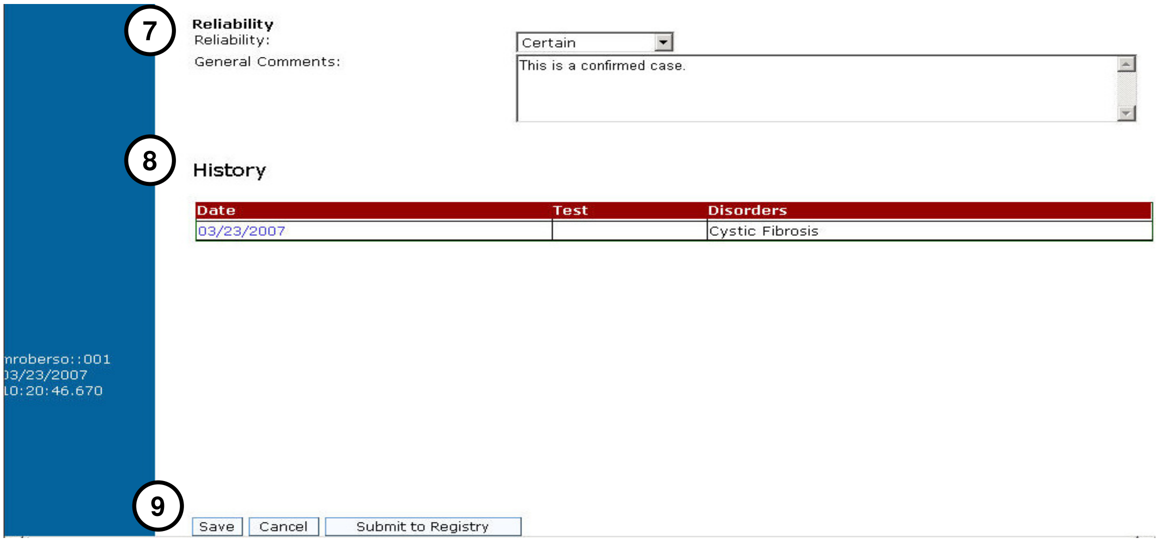
FIGURE 2



4. Information should be filled in using blank boxes, dropdown boxes and calendar icons.
5. **Primary Care Physician Details:** Enter name of the Primary Care Physician (PCP) if known, or use **Search** button to find the physician. Enter the address and phone number of primary care physician.
6. **Specialist Details:** Enter name of specialist if known, or use **Search** button to find the specialist. Enter the address and phone number of specialist.

Enter Case Resolution - Non-Screened (continued)

FIGURE 3



7. **Reliability:** The Registry Monitor will select a value from a dropdown box and enter any comments in the blank box provided.

   Reliability status is used by the registry monitor
   to mark the status of a registry record. It could be one of:

   a. Certain– the case is a confirmed registry case

   b. Tentative or Probable – the case is marked as a tentative registry case which means the registry monitor is not sure if it qualifies to a registry case

   c. Marked for Deletion – the record is marked for deletion and is not counted as a registry case

   d. Not a case – case was submitted to registry and it then turns out to be not a registry case.

   Based on these statuses, the cases appear or not appear on specific registry reports e.g. the Marked for Deletion ones do not appear on any report.

8. **History:** The history of all the resolutions for a client will be displayed at the bottom of each screen. By clicking on the **Date** hyperlink in the **History** grid, the corresponding Diagnosed Case (DC) record will appear on the screen.

9. **Buttons:**

   a. **Save:** Saves all changes.

   b. **Cancel:** Cancels current operation without saving.

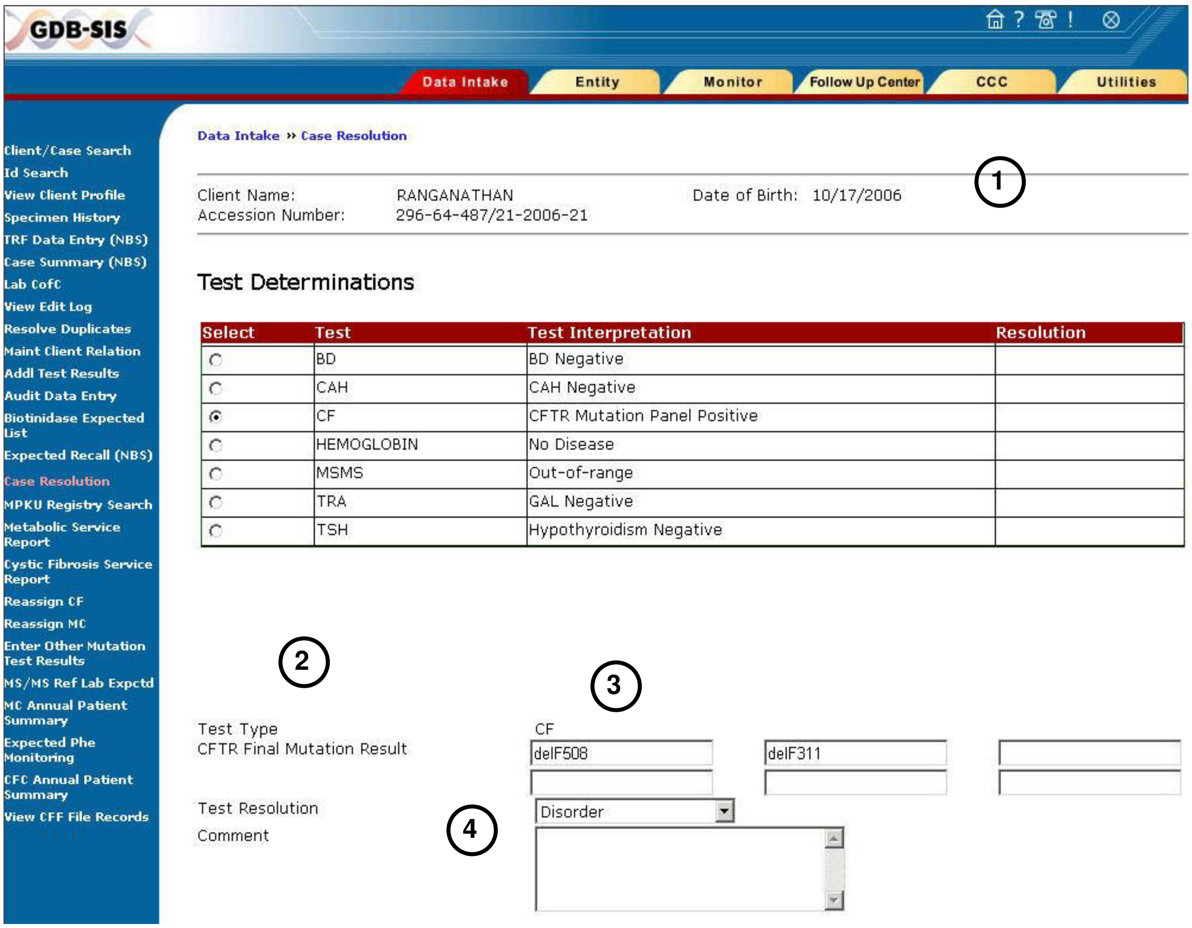
   c. **Submit to Registry:** Clicking the button enters the case into the registry. Only the PDES Registry monitor will be able to submit the case to the registry.

Enter Case Resolution – Screened

Data Intake >> Case Resolution

This screen allows a user to enter the resolution for a diagnosed case which will allow it to be added to the client registry. The user is able to capture data for screened as well as non-screened clients.

FIGURE 1



1. For a screened client, the user will be presented with all the tests in the **Test Determinations** grid. After this test has been selected, the disease diagnosis portion of the screen (mutation "test type") will be enabled and the user will be able to enter the diagnosis associated with that test.

2. The **Test Type** area is pre-populated with testing information from the screened client.

3. **The CFTR Final Mutation Result** field will be displayed only if the CF test is selected. It will be populated based on the CFTR Mutation Analysis or CFTR DNA Sequencing test results, which will be defaulted by the system.

Enter Case Resolution – Screened

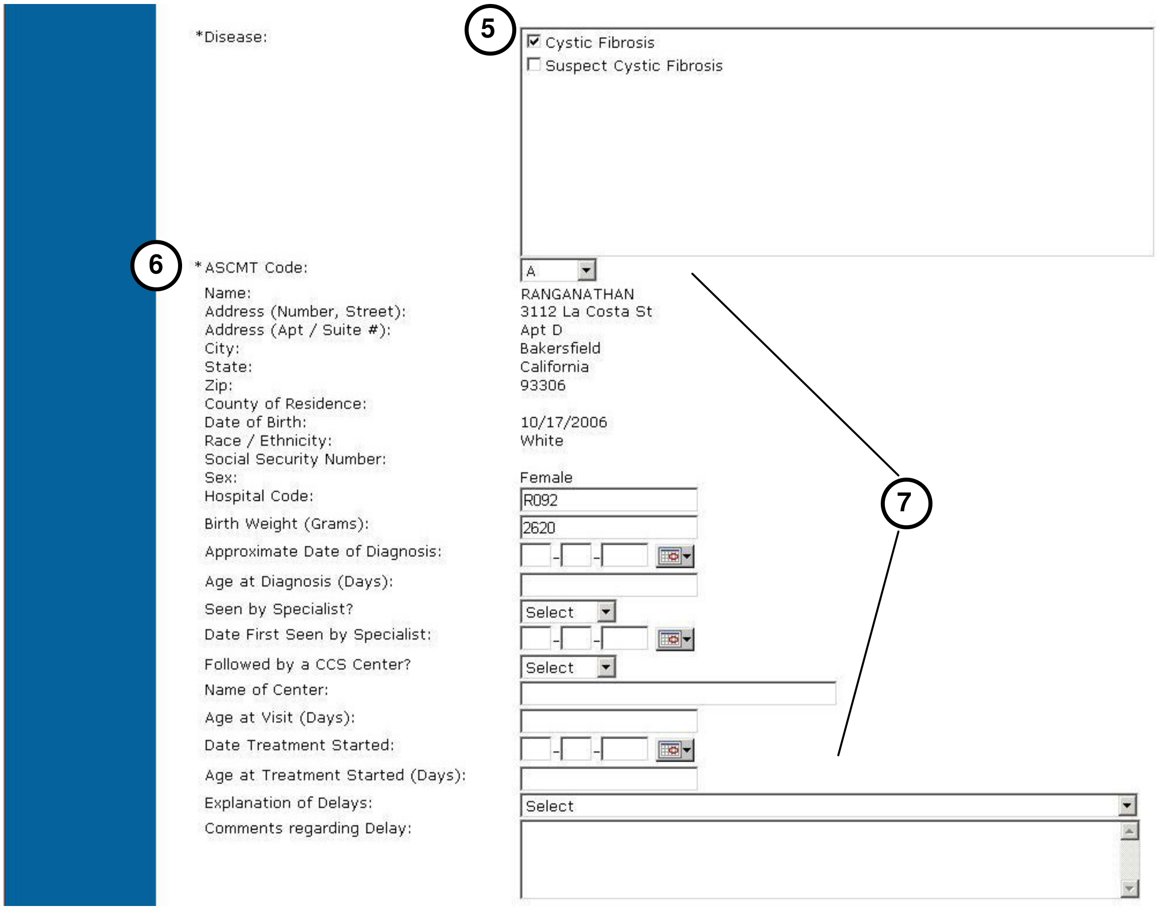
4. **Test Resolution:** A case (screened client) can be resolved using the values in this dropdown list:

    - Disorder – the case is diagnosed as having a disorder
    - No Disorder – the case is diagnosed as a 'No Disorder'
    - Lost to Follow-up – the case cannot be followed up on
    - Parent Refusal – the parents of the child refused to continue with the follow-up for the patient
    - Newborn Expired – the baby expired
    - No Response from Parent – the parents did not respond despite repeated requests for follow-up
    - Other Reasons – any other reason why the follow-up could not be completed
    - Maternal Condition – the baby's mother was diagnosed with a disorder

    If a case is resolved as a Disorder then the other half of the form is displayed to the user to fill in the resolution details.

Enter Case Resolution - Screened (continued)

FIGURE 2



5. The diseases in this list will differ based on the selection in the Test Determination grid in Figure 1. The user must enter a checkmark in one of the boxes from the list.
6. **ASCMT Code:** Select a code from dropdown box:

    A = Screened and identified through the NBS program.

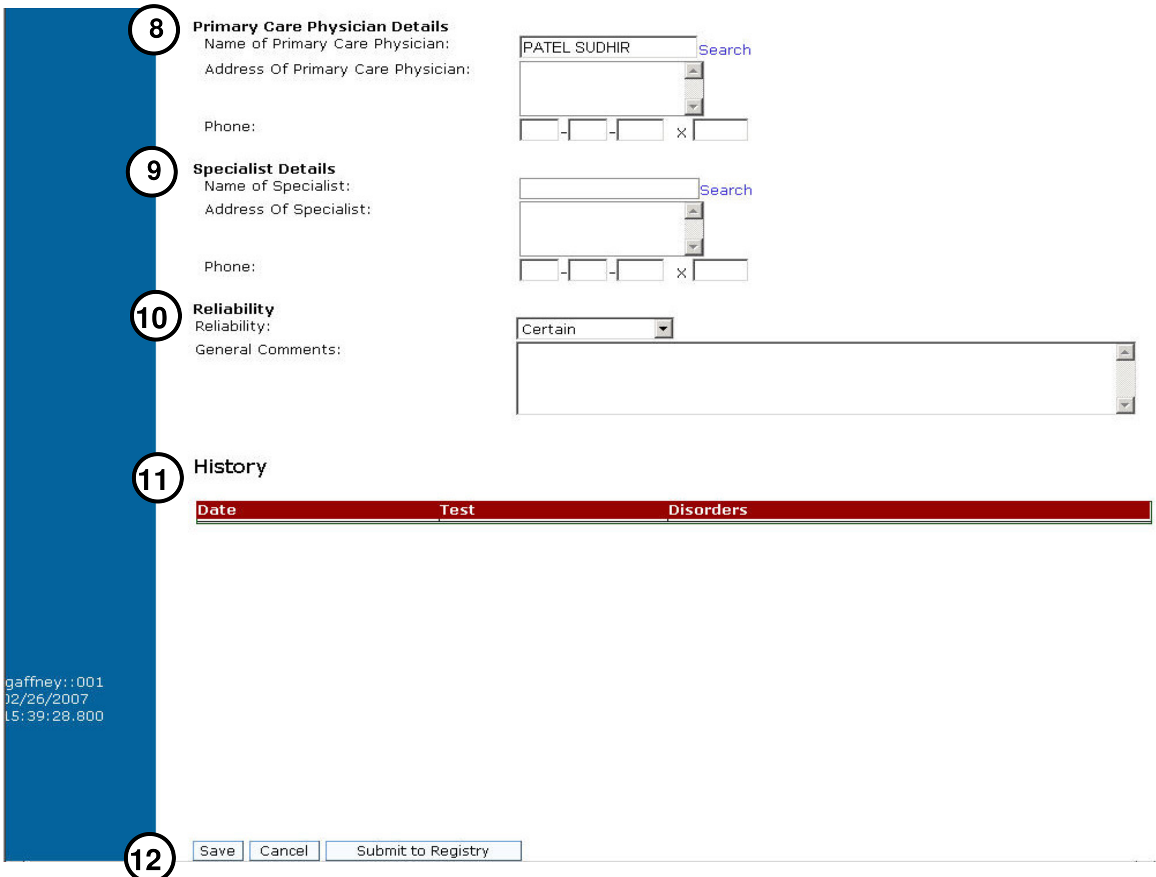
    B = Born in California, but not identified through the NBS program (for a variety of reasons)

    C = Born outside of California.

    D = Screened through California and NBS and missed.
7. Fill in required areas using dropdown boxes for your selection and calendar icon for dates.

Enter Case Resolution - Screened (continued)

FIGURE 3



8. **Primary Care Physician Details:** Enter name of the Primary Care Physician (PCP) if known, or use the **Search** button to find the physician. Fill in address and phone number of PCP.

9. **Specialist Details:** Enter name of specialist if known, or use **Search** button to find the specialist. Enter the address and phone number of specialist.

10. **Reliability:** The reliability status is used only by the Registry Monitor to mark the status of a registry record. It could be one of:

    a. Certain– the case is a confirmed registry case

    b. Tentative or Probable – the case is marked as a tentative registry case means the registry monitor is not sure if it qualifies to a registry case

    c. Marked for Deletion – the record is marked for deletion and is not counted as a registry case

    d. Not a case – case was submitted to registry and it then turns out to be not a registry case.

    Select from the dropdown box and enter any comments in the blank box provided.

Enter Case Resolution - Screened (continued)

Based on the status chosen, the cases appear or not appear on specific registry reports e.g. Marked for Deletion cases do not appear on any report.

11. **History:** The history of all the resolutions for a client will be displayed at the bottom of the screen. By clicking on the date in the history table, the corresponding DC (diagnosed case) record will appear on the screen.

12. **Buttons:**

    a. **Save:** Saves all changes.

    b. **Cancel:** Cancels current operation without saving.

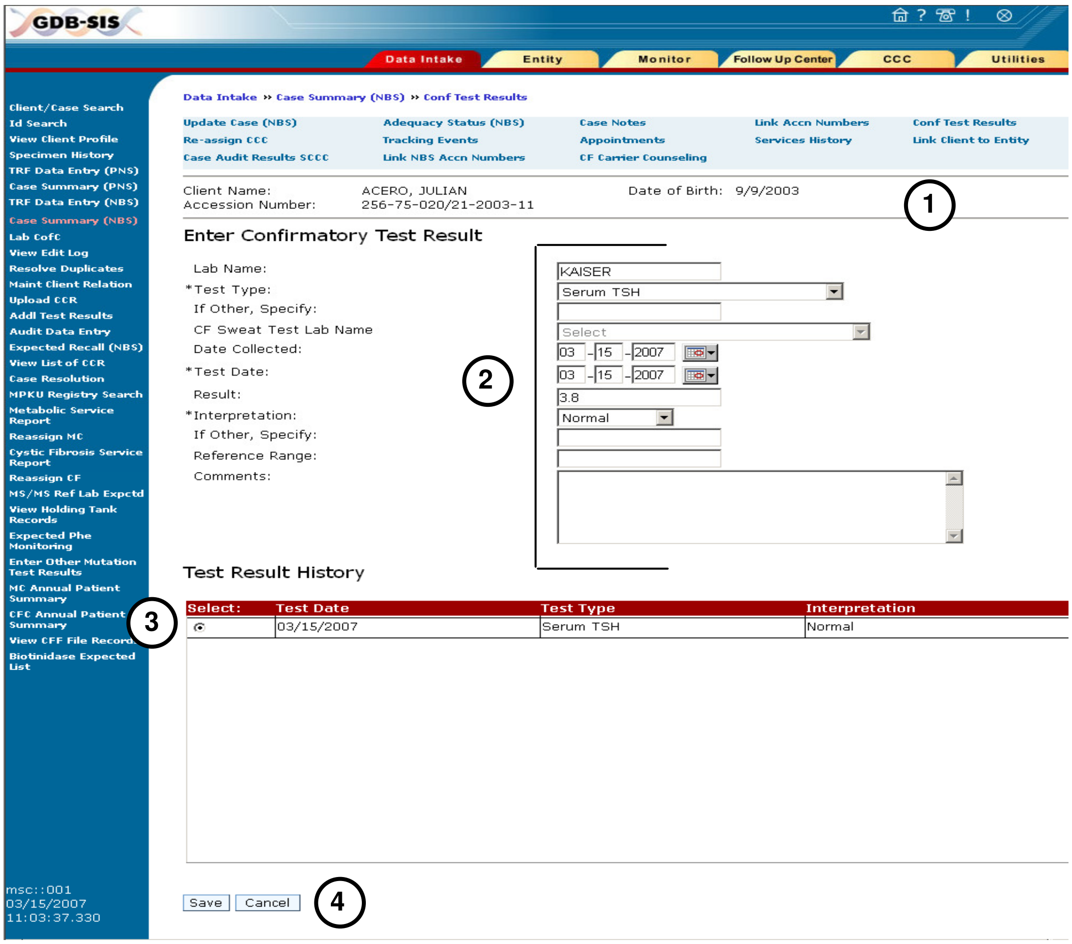
    c. **Submit to Registry:** Saving the record does not enter the case into the registry. Only the PDES Registry monitor will be able to submit the case to the registry.

Enter Confirmatory Test Results

Data Intake >> Case Summary (NBS) >> Conf Test Results

This screen allows users to enter the client test results from a non-contract laboratory. This screen will also allow the user to update or delete existing test results, which are displayed in the Test Result History grid.

FIGURE 1



1. Client information is displayed in a read-only format.

2. Enter results of a new test in the **Enter Confirmatory Test Results** area. **Test Type**, **Test Date** and **Interpretation** are required fields. Lab test **Interpretation** involves multiple criteria to establish a correct diagnosis. This dropdown box contains several descriptive test results choices: Normal, Abnormal, Questionable, Unknown and Other.

3. **Test Result History** is displayed in a data grid. Previous test results for the client are displayed here. Newly-entered test results create a new record in the data grid.

4. **Buttons:**

   a. **Save:** Saves all data.

   b. **Cancel:** Cancels entire operation.

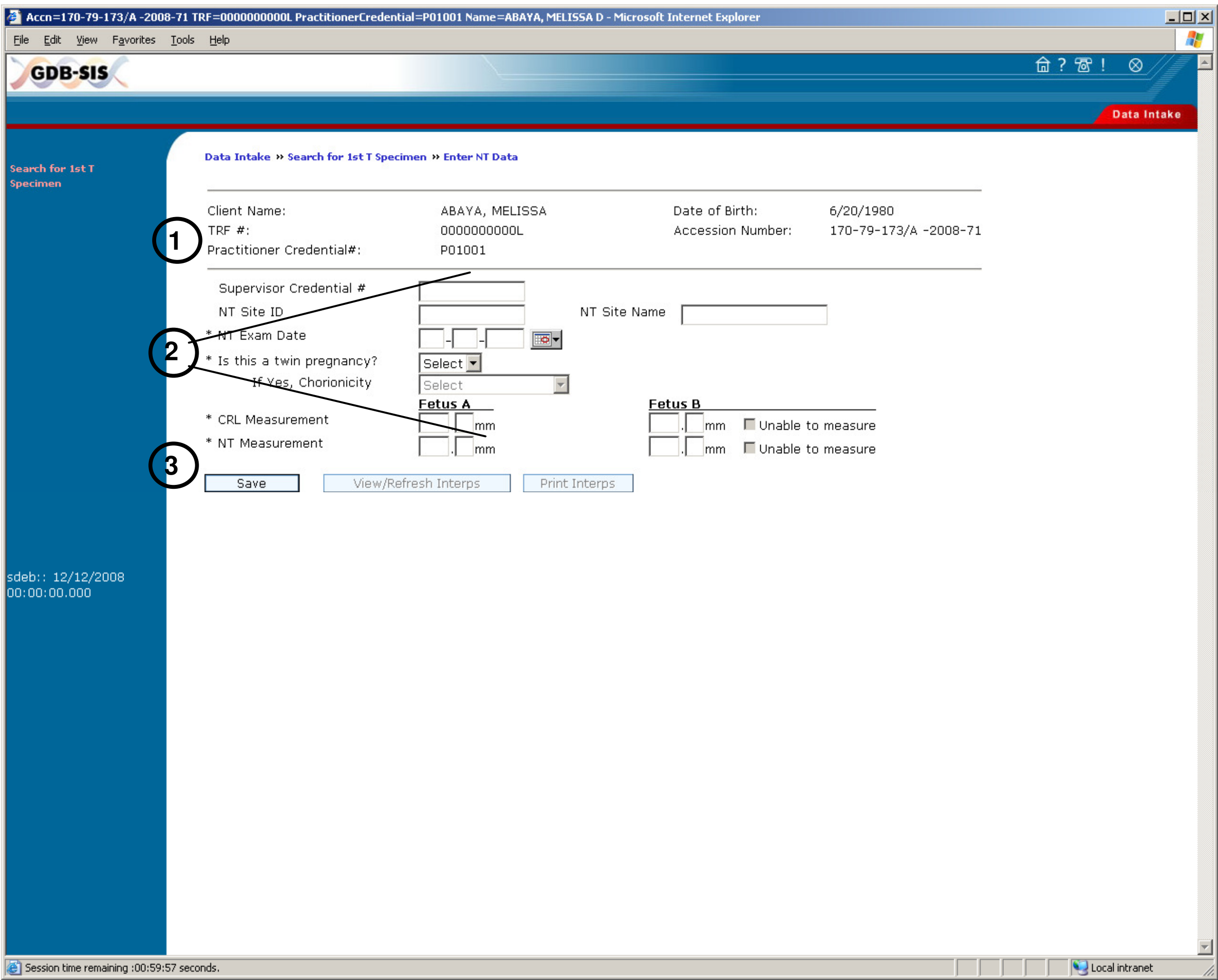
Enter NT Screen

Data Intake » Search for 1st T Specimen » Enter NT Data

The **Enter NT** screen is used to save, view and print NT information about a specific 1st Trimester specimen in SIS. The fields displayed in the Enter NT screen are common across all accession numbers.

To navigate to Enter NT screen, you should search for 1st T specimen from **Search for 1st T Specimen** page using accession number or TRF #.

FIGURE 1



1. The NT header displays **Client information** like Client Name, Date of Birth, TRF #, Accession Number, Practioner Credential #.
2. The NT Practitioner has to **enter the NT information** for the specimen such as NT Exam Date, Twin Pregnancy, Chorionicity, CRL Measurements for Fetus A/B, NT Measurements for Fetus A/B.

Enter NT Screen (continued)

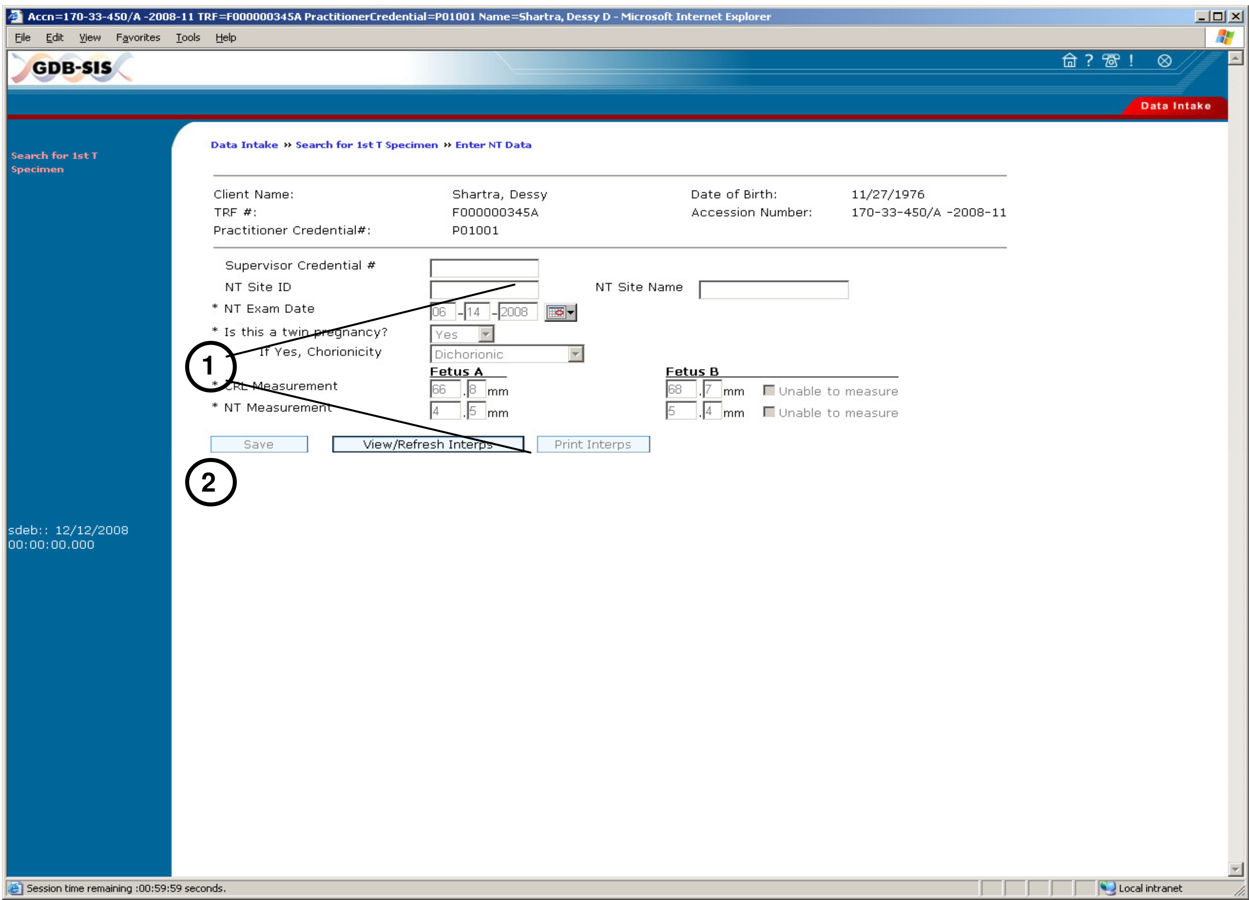
3. **Buttons**

   a. The Save button saves NT information. The data that was entered will be retained in the field in read-only mode for reference.

   b. The View/Refresh button allows displaying details of Interps for Positive, ISI and Preliminary Risk Assessment. Please note that for Positives and ISI cases the NT practitioner need to get the coordinator to confirm the case information before the NT practitioner can view the Interp details.

   c. Print Interps button opens a new window to display the details of Interps.

Figure 2



1. The data entered by the NT Practitioner is shown in read-only mode in the text fields.
2. **Buttons:**

   a. The Save button is disabled.

   b. View/Refresh Interps allows to view detail Interp details depending on Positive/PRA/ISI interps. NRAG interps are not allowed to be viewed.

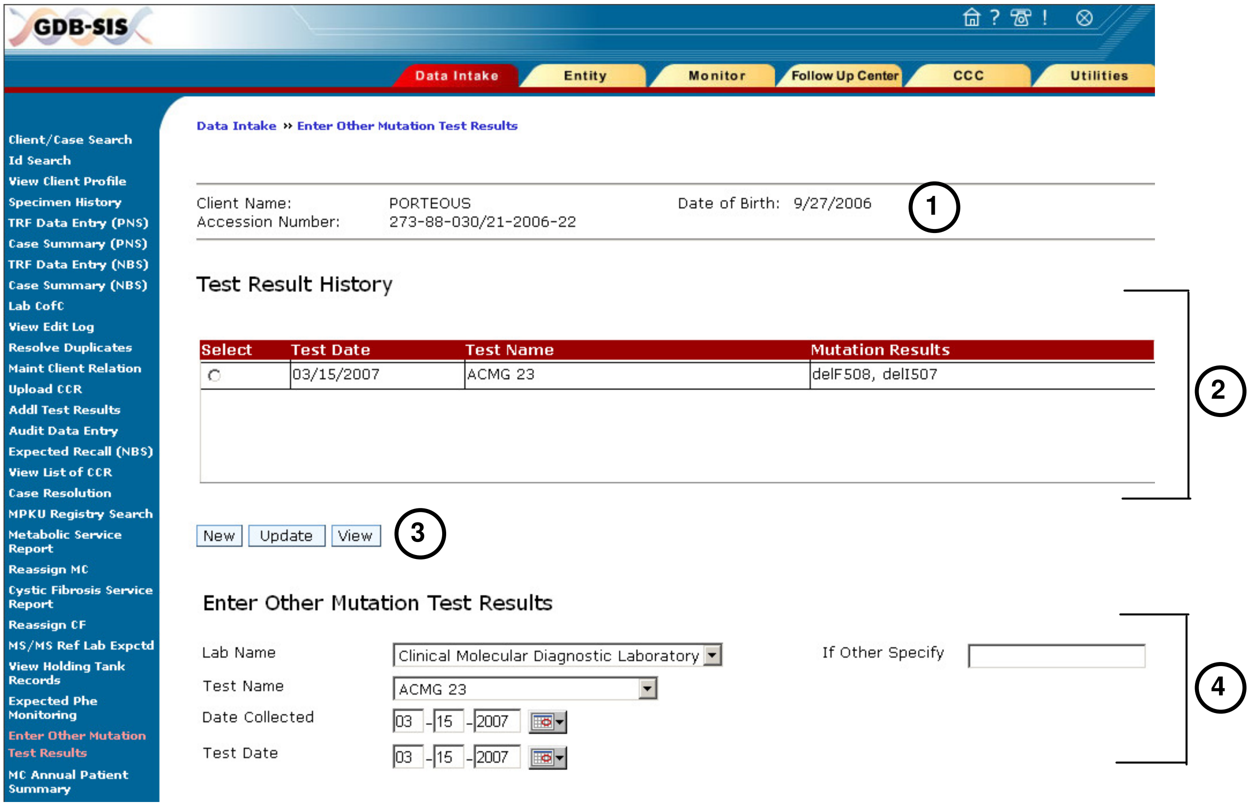
   c. Print Interps is enabled for Positive/PRA/ISI interps.

Enter Other Mutation Test Results

Data Intake >> Enter Other Mutation Test Results

This screen captures the results of any additional Cystic Fibrosis mutation analyses received from the CF Foundation, CF Centers, or other sources.

FIGURE 1



1. Displays client and case information in read-only format.
2. **Test Result History:** Lists all mutation test results that have been entered for the client in the grid. Use the **Select** radio button to indicate the specific mutation test result to be displayed.
3. **Buttons**:
   a. **New:** Displays a new, blank mutation test result form for the patient.
   b. **View:** Displays the mutation test result selected in the grid in read-only mode.
   c. **Update:** Displays the mutation test result selected in the grid in update mode.
4. Enter the high level details of the test that was performed.
   a. Select the name of the lab that performed the test from the **Lab Name** field. If a lab other than those listed in the drop down box performed the test, select **Other**, and specify the lab name in the blank box that follows.

Enter Other Mutation Test Results (continued)

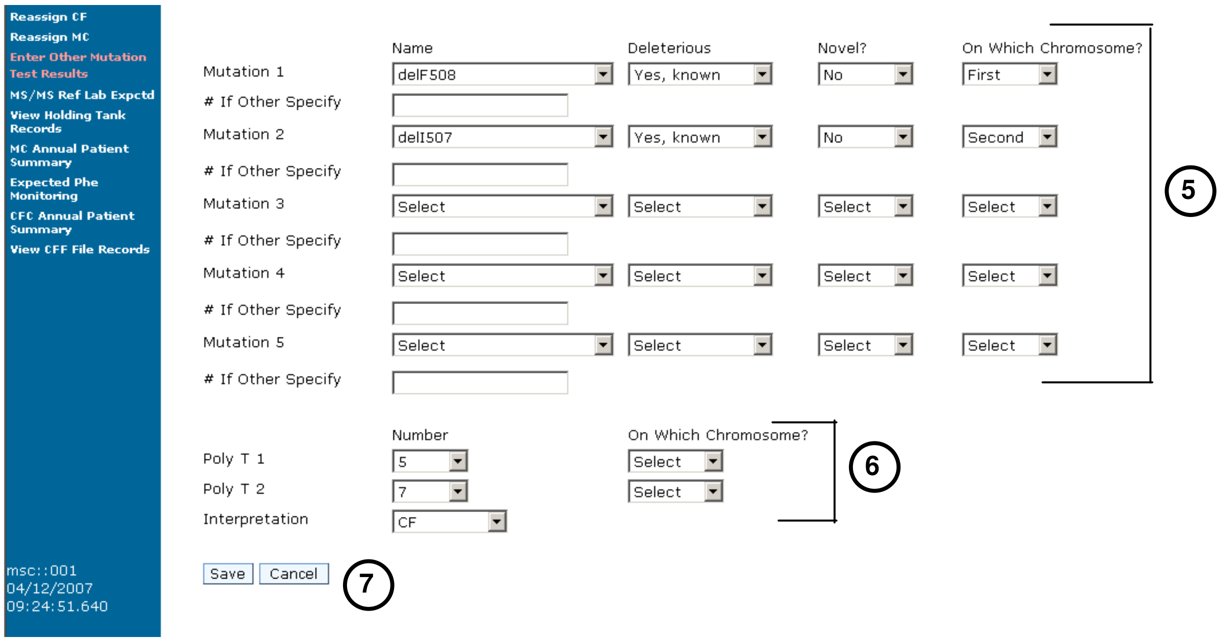
b. Select the name of the test that was performed from the **Test Name** field.

c. Enter the date that the specimen was collected in the **Date Collected** field. If desired, use the calendar icon.

d. Enter the date that the test was performed in the **Test Date** field. If desired, use the calendar icon.

Enter Other Mutation Test Results (continued)

FIGURE 2



5. Enter the details of any mutations that were identified for the test. For each mutation, note the following:

    a. Select the mutation **Name** from the dropdown box. If a mutation other than those listed in the drop down box was identified, select **Other**, and specify the mutation name in the **If Other Specify** field that follows.

    b. Select whether the mutation is **Deleterious**.

    c. Select whether the mutation is a **Novel** variation.

    d. Select the chromosome on which the mutation appeared.

6. Enter any additional details regarding the test.

    a. Select any **Poly Ts** that were identified and the chromosome on which they appeared.

    b. Enter the overall **Interpretation** derived from the test.

    Note: If further mutation testing changes current test results, the revised results must be updated on the Case Resolution screen by the NBS Coordinator. Data from this screen will not be displayed elsewhere in SIS.

7. **Buttons:**

    a. **Save:** If any errors are present on the form, they are displayed in red on the screen, and the information will not save until they are corrected. If no errors are present, the detailed form is closed, and the new or updated mutation test result appears in the **Test Result History** grid that is displayed.

    b. **Cancel:** Closes the detailed form without saving changes.

Enter PSR

Follow Up Center >> Case Summary (PNS) >> Enter PSR

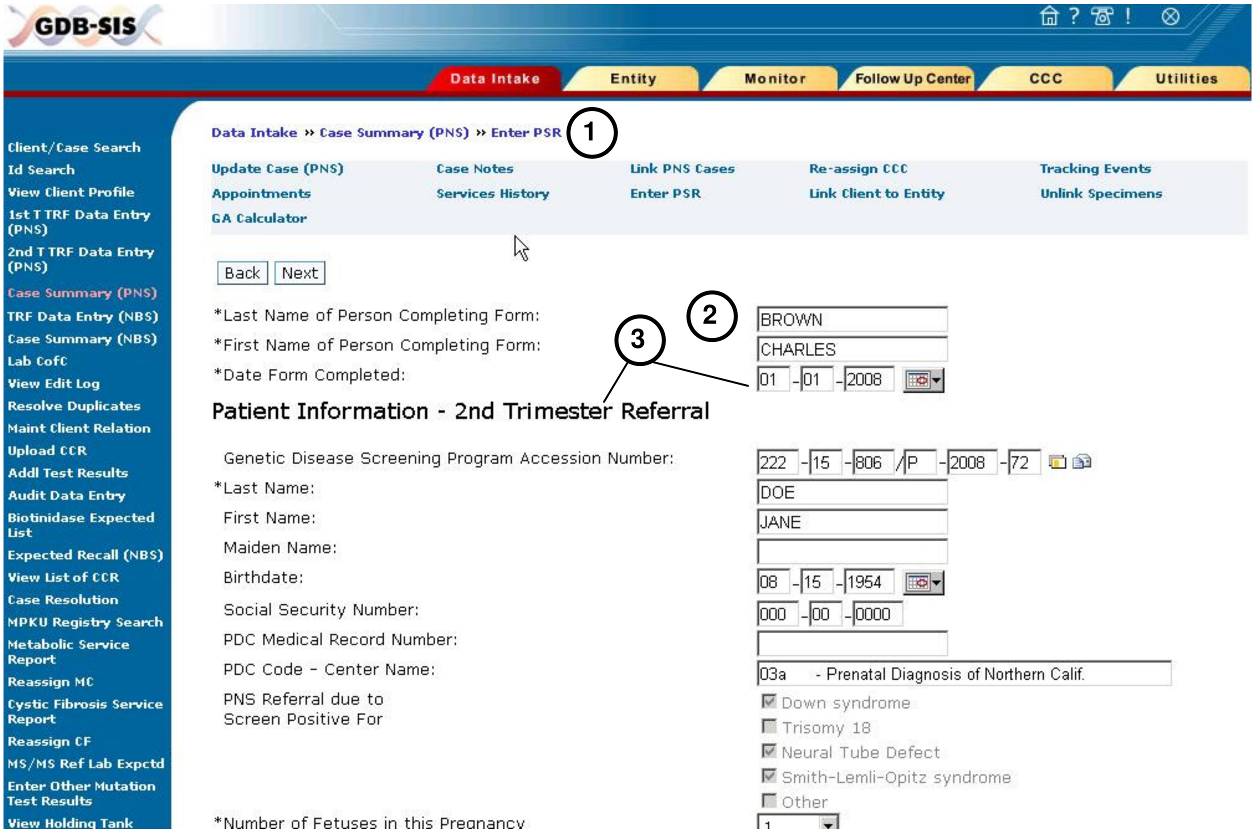
The **Enter PSR** screen (**FIGURE 1**) will allow a PDC to begin entering a Patient Services Report (PSR) to document the services provided to a patient by a PDC. Several prerequisites should be met before a PSR can be entered. A Case Coordination Center (CCC) must first refer a patient to your PDC. Once the referral has been made, you can enter/update appointment information by clicking on the Appointments 3rd level link. An appointment with the patient must be “Scheduled” and “Kept” for second trimester cases or “Scheduled” and “Kept” or “GC Appt Kept - Dx Not Scheduled” for first trimester cases in SIS.

Each service type has a separate screen in SIS. The screens for each of these services are also described in this User Manual. The screens are:

- Enter PSR Genetic Counseling (GC)
- Enter PSR Amniocentesis (AM)
- Enter PSR Ultrasonography (US)
- Enter PSR Smith-Lemli-Opitz Syndrome (SLOS)
- Enter PSR Other/Karyotype (Other/Karyo)
- Enter PSR Pregnancy Status (PregStatus)
- Enter PSR CVS (Chorionic Villus sampling)
- Enter PSR Modified Genetic Counseling (Modified GC)

The details of **Enter PSR** screen are mentioned below:

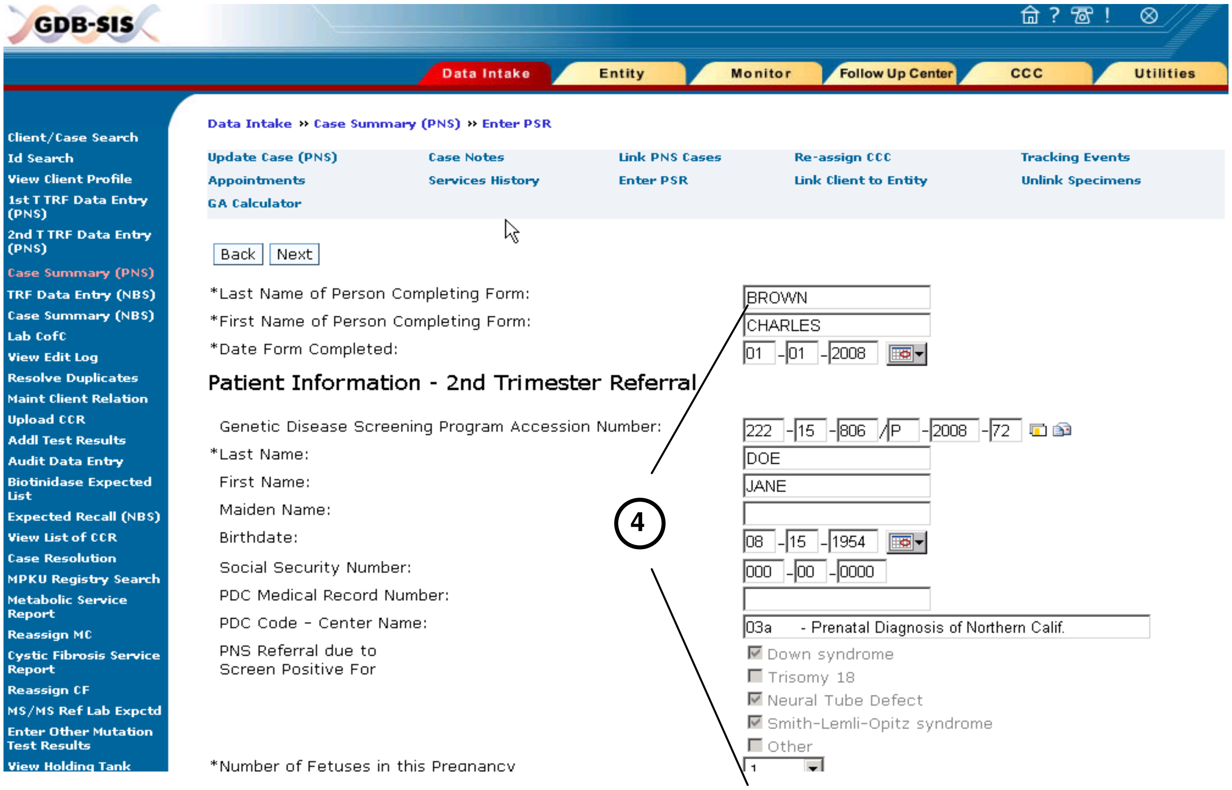
FIGURE 1



1. Navigation and screen name
2. PSR entry begins with Last and First Name of the person completing the PSR form.
3. **Date Form Completed.** You may enter the date or select the date from the calendar dropdown. The label displays the trimester information.

Enter PSR (continued)

FIGURE 2



4. **Patient Information** is pre-filled based on the information in the Case Summary. Last Name, First Name, Maiden Name, Social Security Number and PDC Medical Record Number fields are pre-filled. Only Name fields, Social Security and PDC Medical Record Number may be edited. A date of birth or screening indication change must be communicated to the Case Coordination Center (CCC). PDC Code and Center name changes can be directed to GDB.

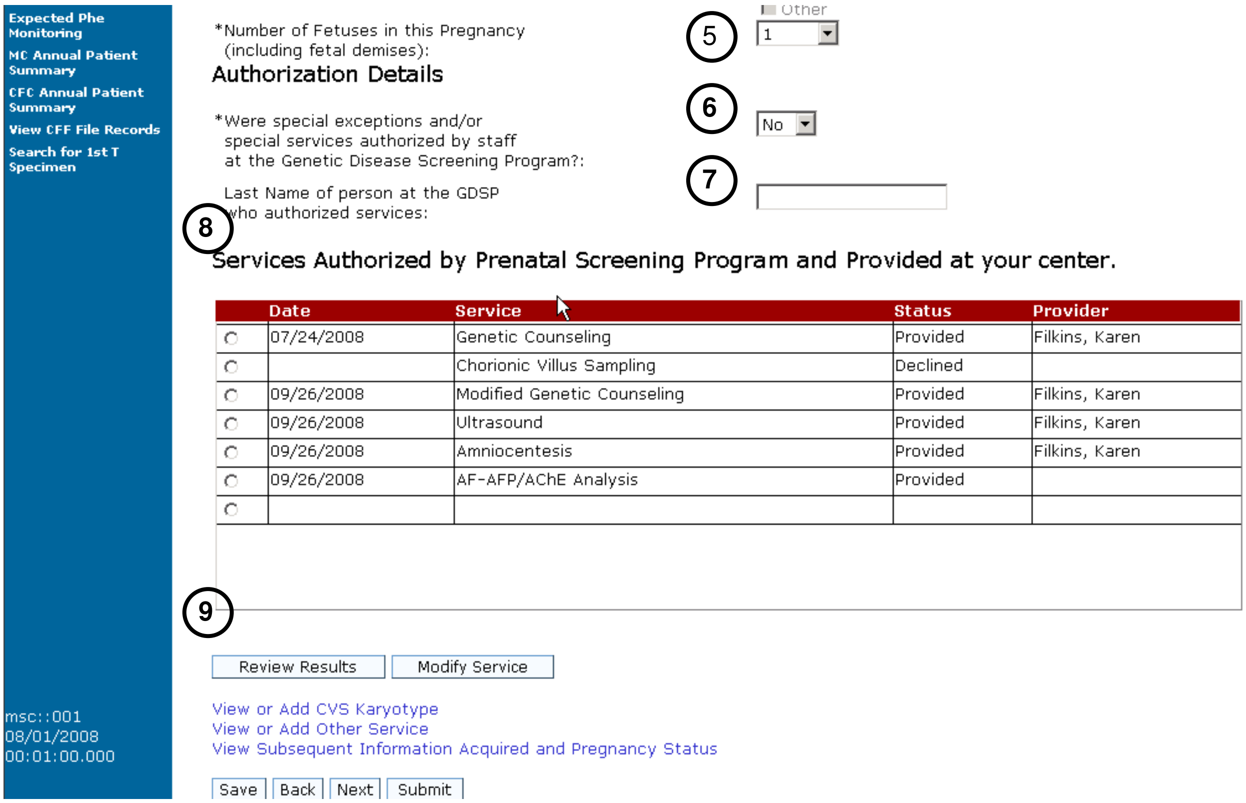
Note: 1. Last Name is a required field.

2. “PNS referral due to Screen Positive For” fields are disabled and will always be populated from the latest interpretation results.

3. For first trimester cases only “Down Syndrome”, “Trisomy 18” and “Other” checkboxes will be visible.

Enter PSR (continued)

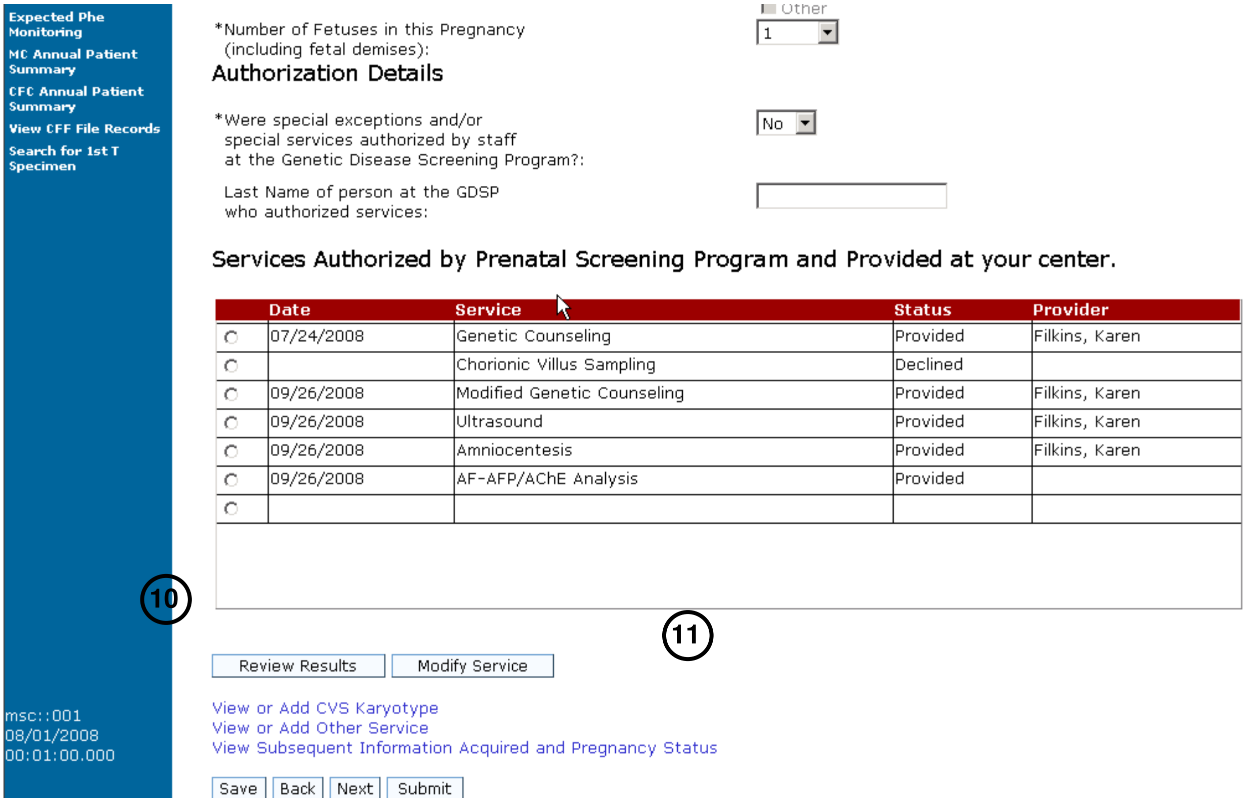
FIGURE 3



5. **Number of Fetuses in this Pregnancy** (including fetal demises) is a required dropdown field denoted by the asterisk (*).
6. Special Services Authorization information is a required dropdown field denoted by the asterisk (*). You must select “Yes” or “No” from the dropdown.
7. If Special Services were authorized, the last name of the person at GDB who authorized the follow-up services becomes a required field.
8. **Services Authorized** grid will contain a list of all services and related information that have been entered into the PSR. As you enter and save service information throughout the PSR, the service will be added to this grid.
9. **Buttons**:
    a. **Modify Service** - You may select a service using the radio button in the grid, then click the **Modify Service** button to edit or delete a service in the grid, or add another authorized service of the same type. This will display the screen corresponding to this service.
    b. **Review Results** - The **Review Results** button displays the screen corresponding to the results of the service that is selected using the radio button next to the grid entry. The screen opens up in a normal mode and any further operation scan be performed on the screen.

Enter PSR (continued)

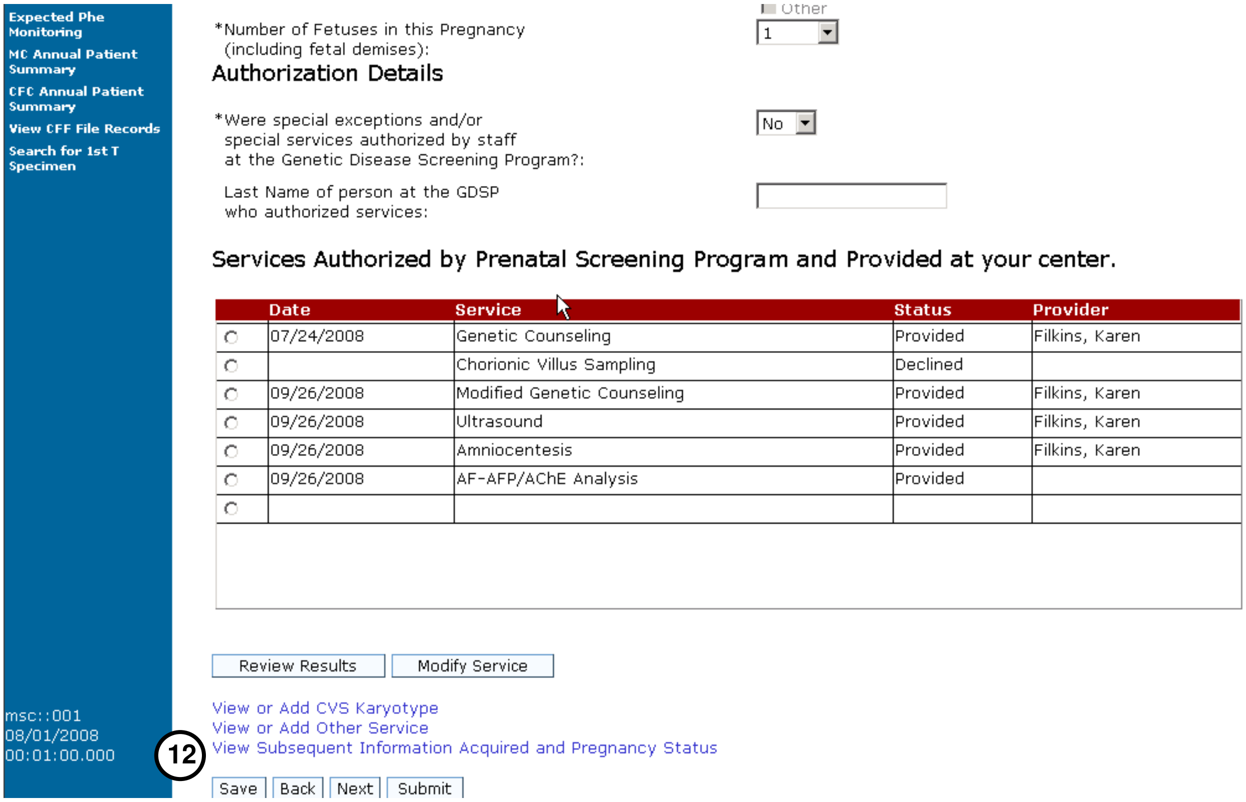
FIGURE 4



10. **View or Add CVS Karyotype** link enables navigation to the Chorionic Villus sampling screen where CVS service and CVS Karyotype details can be entered. This link will be enabled only for 1st Trimester PSRs.
11. **View or Add Other Service** link enables navigation to the Enter PSR Other/Karyo screen. Here, Other Services such as Placental Biopsy, Fetal Tissue Karyotype and PUBS can be entered. Also the Karyotype information (for Amniocentesis or for any of the above mentioned Other Services) can be entered on this screen. This link will be available for 2nd Trimester PSRs, or for those 1st Trimester PSRs for which Amniocentesis and Karyotype services get authorized when the GA becomes 15 weeks or more.
12. **View Subsequent Information Acquired and Pregnancy Status** link enables navigation to the Enter PSR – PregStatus screen where pregnancy status and any subsequent information for the pregnancy can be entered. This link is available for 1st Trimester as well as 2nd Trimester PSRs.

Enter PSR (continued)

FIGURE 5



13. **Buttons**:

   a. **Save-** saves the information entered in the PSR. Once you click **Save**, any resulting PSR Inconsistencies will be displayed at the top of the screen. Clicking **Save** will ensure your work is saved and allow you to continue your work at another time before submitting the PSR to GDB.

   b. **Back-** returns you to the previous screen in SIS, discarding any unsaved information.

   c. **Next-** will move you through each service (GC, US, SLOS, Other/Karyo, PregStatus) screen and allow you to enter details for each service provided.

   d. **Submit-** begins the PDC invoicing process. The **Submit** button will be unavailable until you have completed the PSR information and you are returned to the Enter PSR screen, which is the screen that has the **Services Authorized** grid. This grid displays a summary of the service information you have entered.

      - If there are any inconsistencies (red text messages at the top of the screen) on the PSR, an “Alert” message will be sent to GDB staff to notify them of the inconsistencies. If there are no inconsistencies, the PDC information will be sent to the Business Services System (BSS) for invoice processing.

Enter PSR (continued)

- Alerts 34, 35, 93, 94, New Alert 17, New Alert 18, New Alert19 and Alert 15 may get fired on PSR submission, depending on the other PSR conditions. DE 211 is also fired on PSR submission.
- PSR Submission Date, Inconsistency Resolved Date and Inconsistency Unresolved Date are added to the audit trail on PSR submission.
- Note: the PDC must click the **Save** button, then the **Submit** button on the Enter PSR screen before SIS will allow GDB staff to assist with any related inconsistencies.

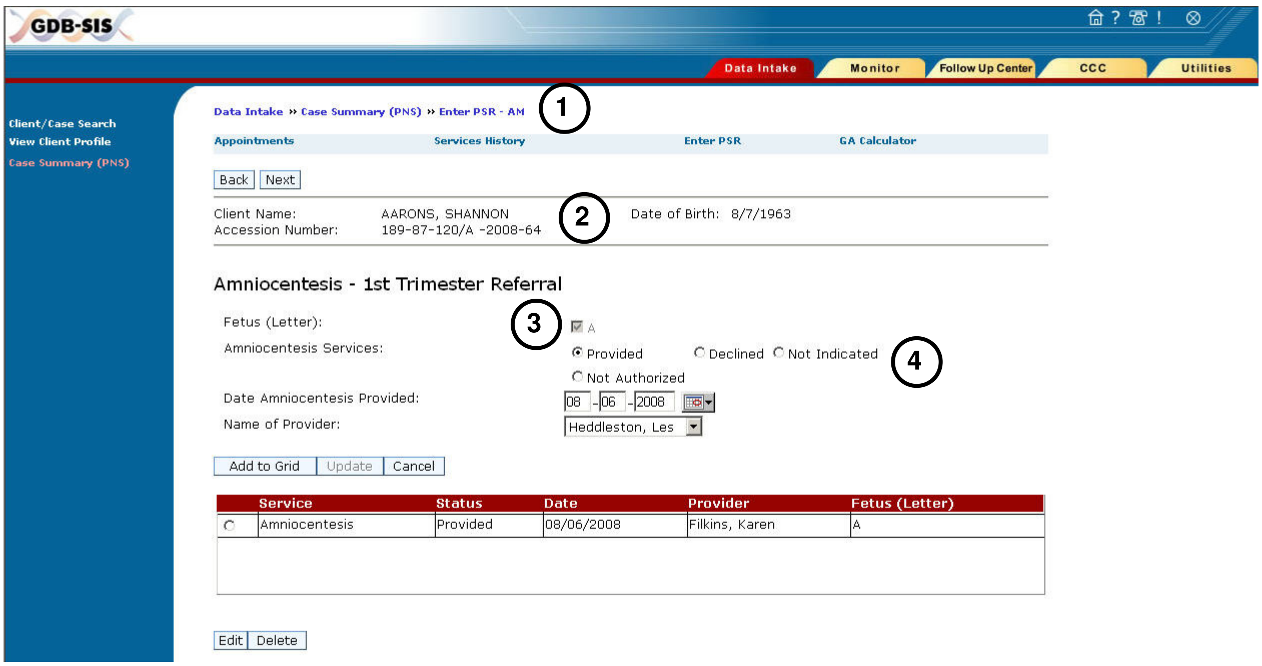
Enter PSR – AM (Amniocentesis)

Follow Up Center >> Case Summary (PNS) >> Enter PSR - AM

The **Enter PSR-AM** screen will allow the PDC to enter information for Amniocentesis service(s) provided. You may navigate to this screen or other PSR screens by: 1) clicking the **Next** button to progress through the PSR screens, or 2) selecting an Amniocentesis service record from the services grid on the Enter PSR screen and clicking the '**Add New Service**' button. Services requiring special authorization must be authorized in SIS by GDB staff. Any unauthorized services identified on the PSR will create an inconsistency in SIS.

The screen was modified to display trimester information.

FIGURE 1

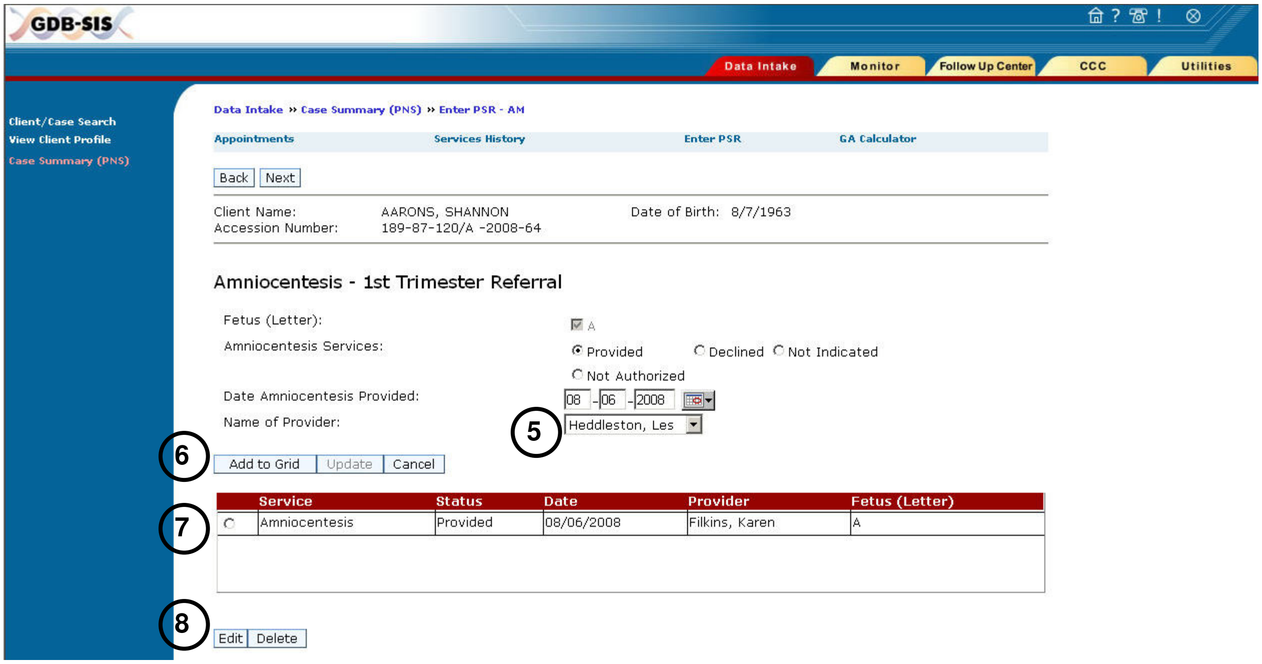


1. Navigation and screen name.
2. Client information is displayed in a read-only format.
3. Check the **Fetus (Letter)**. If the number of fetuses you entered on the Enter PSR screen in the required field **Number of fetuses in the pregnancy** (include fetal demises) is more than one fetus, a letter will be displayed for each fetus. For example, for 2 fetuses there will be a box A and box B. You must select a fetus letter before adding a record to the Amniocentesis results grid.
4. **Amniocentesis Services** information: You must select a radio button to indicate whether Amniocentesis Services were "Provided", "Declined", "Not Indicated" or "Not Authorized". If this service was not provided, you **must** select an Amniocentesis Service status radio button ("Provided", "Declined",

"Not Indicated", or "Not Authorized") to add a record to the grid and click the **Save** button before moving on to the next PSR screen.

Enter PSR – AM (Amniocentesis) (continued)

FIGURE 2

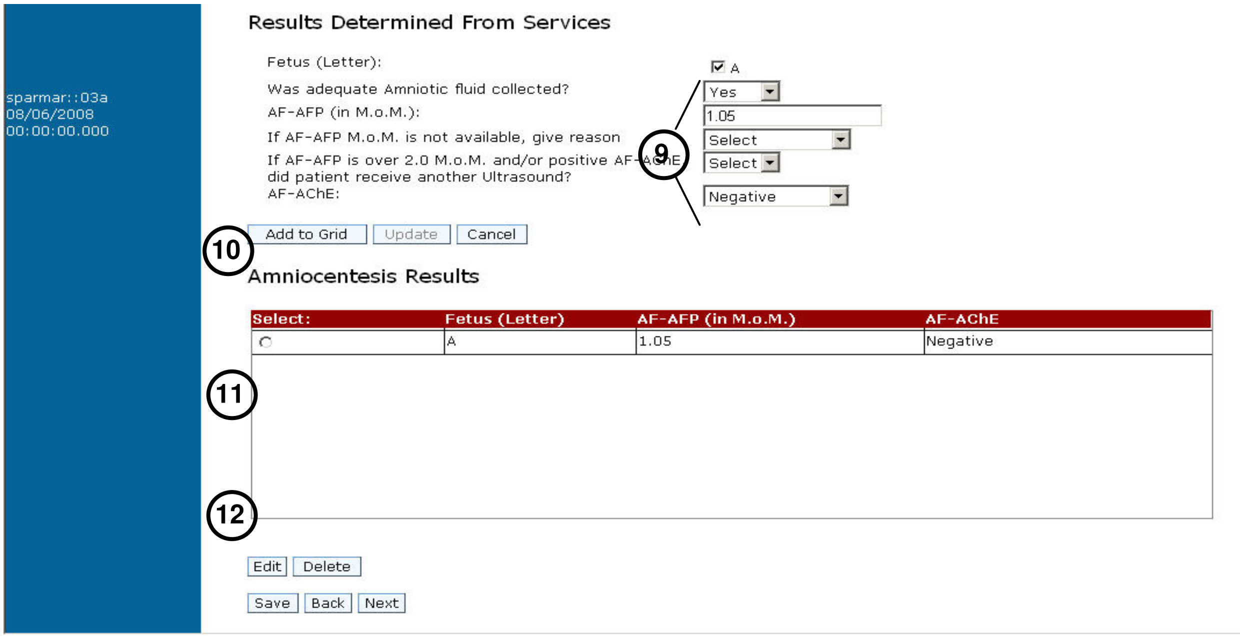


Date of Amniocentesis Provided: You must enter a date of service for Amniocentesis if it was performed and you selected the radio button “Provided” or “Not Authorized”.

5. **Name of Provider**: You must select the name of provider from the dropdown if the Amniocentesis service was provided.
6. **Buttons:**
   a. **Add to Grid** – adds the entered service information to the service grid to the grid.
   b. **Update** – allows you to change information in a selected record from the grid. You must click the **Edit** button, make your changes to Amniocentesis Service information and then click the **Update** button to save the update.
   c. **Cancel** – clears the entered information in the Amniocentesis fields (3-6) discarding any unsaved information.
7. The Service grid displays the status of Amniocentesis service(s) on a specific date with a specific provider if this service was “Provided” or “Not Authorized”. Once you’ve clicked the **Add to Grid** button, a row will be added to the grid to display the Amniocentesis information you have entered in the fields above.
8. **Buttons**:
   a. **Edit** – populates the information for the selected service record in the Amniocentesis services fields, allowing you to edit the existing information.
   b. **Delete** – deletes the service you have selected from the Amniocentesis service grid.

Enter PSR – AM (Amniocentesis) (continued)

FIGURE 3



9. **Amniocentesis results**. Select or enter the results information.
10. **Buttons**:
    a. **Add to Grid** – adds the AF-AFP and AF-AChE results to the grid. If you select “Provided” or “Not Authorized” in the Amniocentesis Services field, you must add the results to the grid before clicking the **Save** button and moving to the next PSR screen.
    b. **Update** – allows the user to update Amniocentesis results after selecting a record from the Amniocentesis results grid.
    c. **Cancel** – clears the entered information in the Amniotic fluid and AF-AFP/AChE fields, discarding any unsaved information.
11. **Amniocentesis Results** grid displays the results you have added in the fields (10) above.
12. **Buttons**:
    a. **Edit** – populates the information for the selected result record in the Amniocentesis result field allowing you to edit the existing information.
    b. **Delete** – deletes the information for the selected result record you have selected from the **Amniocentesis Result** grid.
    c. **Save** – saves the information you have entered in SIS. Clicking **Save** will ensure your work is saved and allow you to continue your work at another time before submitting the PSR. Clicking **Save** will trigger any PSR inconsistencies that exist. These inconsistencies are errors or omissions in the PSR. **A message about the inconsistency will be displayed at the top of the screen.** Any inconsistencies (if present) for Amniocentesis will be displayed at the top of the screen. The

Enter PSR – AM (Amniocentesis) (continued)

inconsistency message will direct you to enter some missing or erroneous information or to contact the CCC. Inconsistencies should be corrected before the PSR is submitted to GDB.

d. **Back** – returns you to the previous screen in SIS discarding any unsaved information.

e. **Next** – moves you to the **Enter PSR – SLOS** screen.

Enter PSR – CVS (Chorionic Villus Sampling)

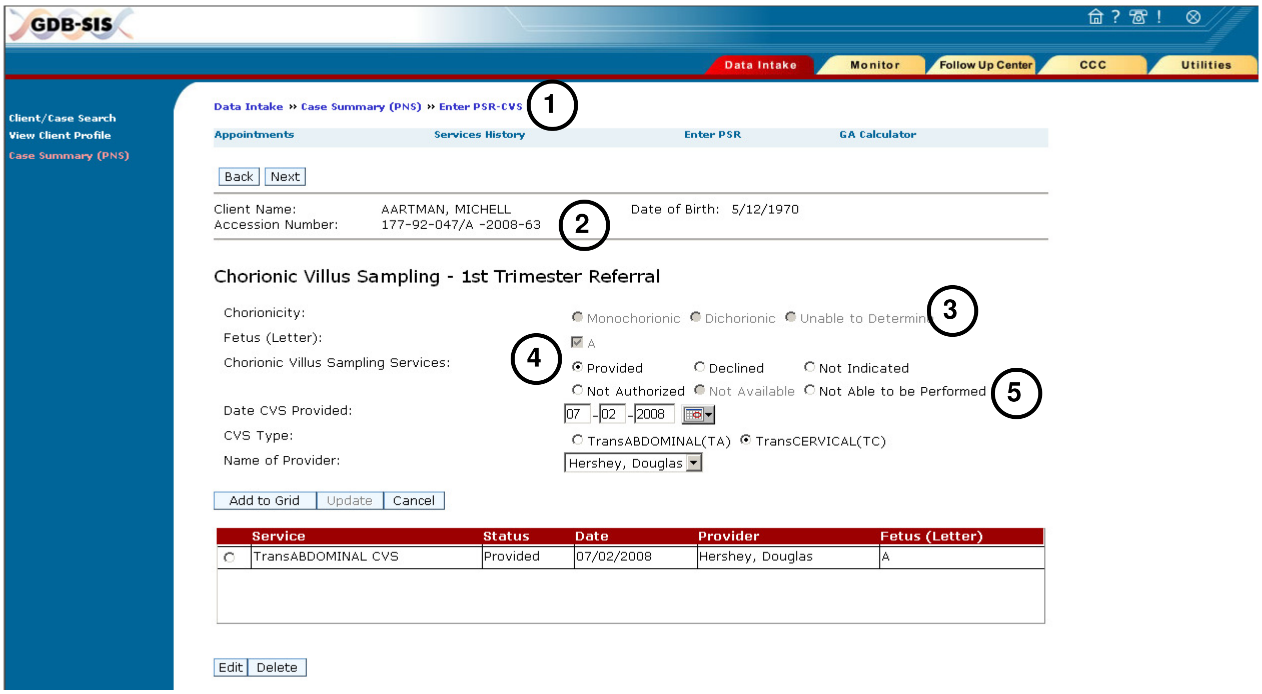
Follow Up Center >> Case Summary (PNS) >> Enter PSR - CVS

The **Enter PSR-CVS** screen will allow the PDC to enter information for CVS service(s) provided. You may navigate to this screen or other PSR screens by: 1) clicking the **Next** button to progress through the PSR screens, or 2) selecting an CVS service record from the services grid on the Enter PSR screen and clicking the '**Add New Service'** button. Services requiring special authorization must be authorized in SIS by GDB staff. Any unauthorized services identified on the PSR will create an inconsistency in SIS.

• This screen was created for new PSR services for CVS and related business functionalities

• This screen also addresses new inconsistencies

FIGURE 1



13. Navigation and screen name.

14. Client information is displayed in a read-only format.

15. User can select **Chorionicity** when numbers of fetuses are more than one. When only one fetus is present, chorionicity radio buttons are disabled.

16. Check the **Fetus (Letter)**. If the number of fetuses you entered on the Enter PSR screen in the required field **Number of fetuses in the pregnancy** (include fetal demises) is more than one fetus, a letter will be displayed for each fetus. For example, for 2 fetuses there will be a box A and box B. You must select a fetus letter before adding a record to the CVS services grid.

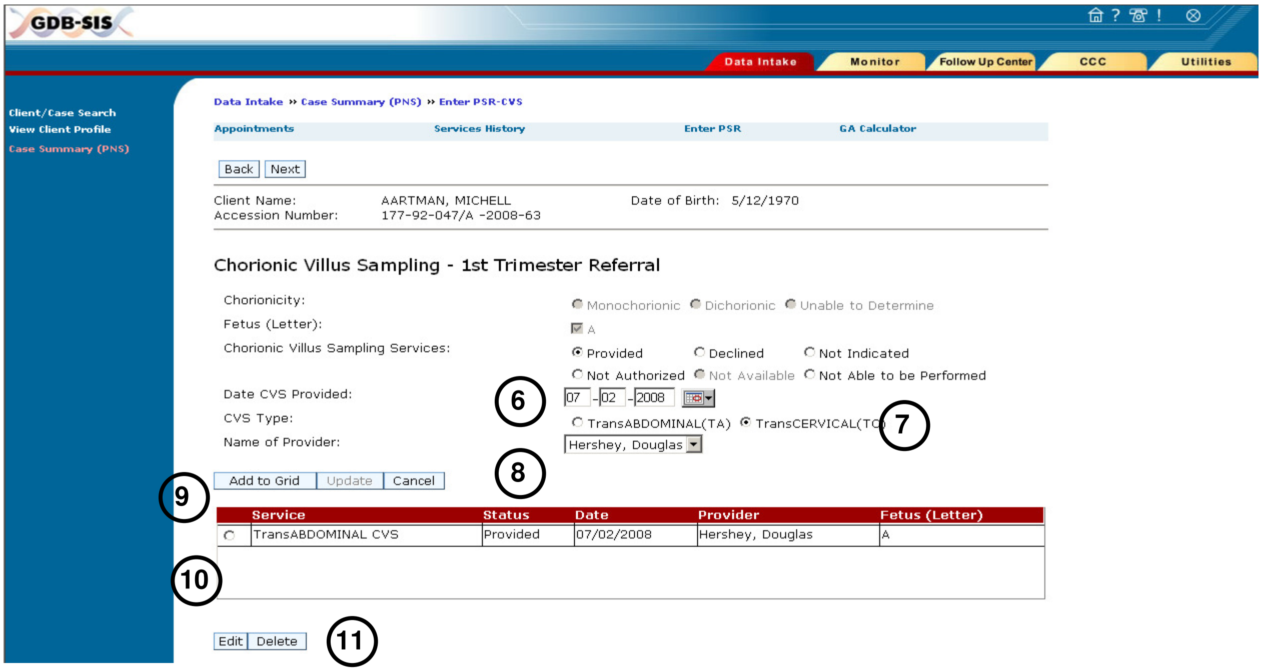
17. **CVS Services** information: You must select a radio button to indicate whether CVS Services were "Provided", "Declined", "Not Indicated" , "Not Authorized", "Not Available" or "Not Able to be Performed". If this service was not provided, you **must**

Enter PSR – CVS (Chorionic Villus Sampling) (continued)

select an CVS Service status radio button ("Provided", "Declined", "Not Indicated" , "Not Authorized", "Not Available" or "Not Able to be Performed") "Not Indicated", or "Not Authorized") to add a record to the grid and click the **Save** button before moving on to the next PSR screen.

If the PDC does not offer CVS, then the "Not Available" radio button will be pre-populated and the radio button will be grayed out.

FIGURE 2



18. **Date of CVS Provided**: You must enter a date of service for CVS if it was performed and you selected the radio button "Provided" or "Not Authorized" as CVS service status.
19. **CVS Type**: You must enter a type of service for CVS if it was performed and you selected the radio button "Provided" or "Not Authorized" as CVS service status.
20. **Name of Provider**: You must select the name of provider from the dropdown if the CVS service was performed and you selected the radio button "Provided" or "Not Authorized" as CVS service status.
21. **Buttons:**

    d. **Add to Grid** – adds the entered service information to the service grid to the grid.

    e. **Update** – allows you to change information in a selected record from the grid. You must click the **Edit** button, make your changes to CVS Service information and then click the **Update** button to save the update.

    f. **Cancel** – clears the entered information in the CVS fields (5-8) discarding any unsaved information.

Enter PSR – CVS (Chorionic Villus Sampling) (continued)

22. The Service grid displays the status of CVS service(s) on a specific date with a specific provider if this service was "Provided" or "Not Authorized". Once you've clicked the **Add to Grid** button, a row will be added to the grid to display the CVS information you have entered in the fields above.

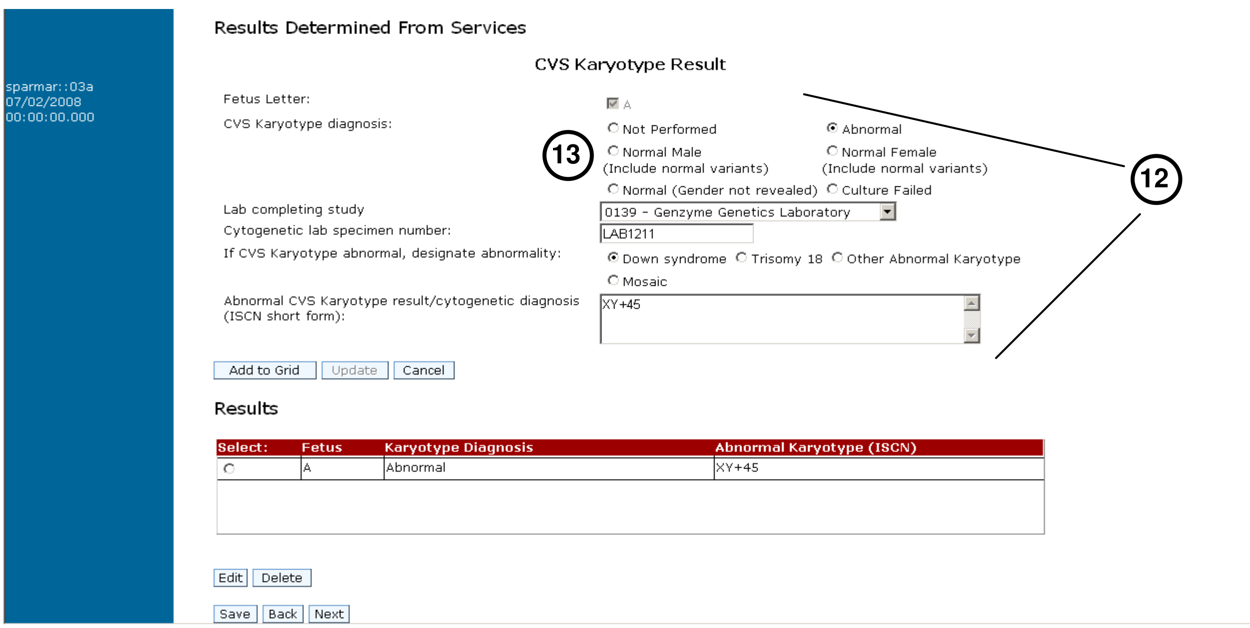
23. **Buttons**:

    c. **Edit** – populates the information for the selected service record in the CVS services fields, allowing you to edit the existing information.

    When any of the records from service grid is in Edit mode:
    - Chorionicity radio buttons will be pre populated based on the initial selection, and disabled.
    - Fetus letter checkboxes will be pre populated based on the selection from the grid, and disabled.

    d. **Delete** – deletes the service you have selected from the CVS service grid.

FIGURE 3



24. **CVS Karyotype results**: Select or enter the results information.

25. **CVS Karyotype diagnosis**: Select one of the radio buttons ("Not Performed", "Abnormal", "Normal Male", "Normal Female", "Normal", "Culture Failed") to indicate CVS karyotype diagnosis. Based on following conditions, fields are enabled or disabled.
    a. Only when the user selects "Abnormal" as the CVS Karyotype Diagnosis, the "Abnormal CVS Karyotype result/cytogenetic diagnosis (ISCN short form)" text box will be enabled.
    b. If the user selects "Not Performed" or "Culture Failed" as the CVS Karyotype Diagnosis, then "Name of Lab Completing Study" dropdown, "Cytogenetic Lab Specimen Number" textbox, "If CVS Karyotype abnormal, designate abnormality"

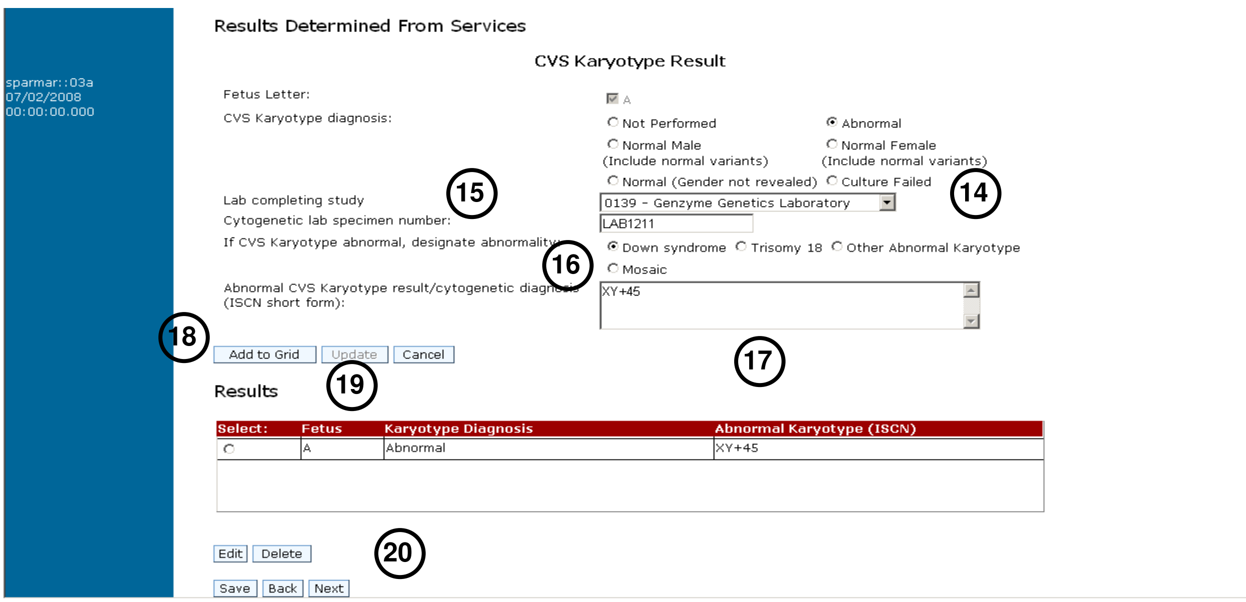
Enter PSR – CVS (Chorionic Villus Sampling) (continued)

radio buttons and “Abnormal CVS Karyotype result/cytogenetic diagnosis (ISCN short form):” textbox are disabled.

c. If CVS Karyotype Diagnosis is selected as “Normal Male”, “Normal Female” or “Normal (Gender not revealed)”, then “Add to Grid” and “Update” buttons are
enabled only when a value is entered/selected in “Lab completing study” field and the “Cytogenetic lab specimen number” field.

d. If CVS Karyotype Diagnosis is selected as “Abnormal”, then “Add to Grid” and “Update” buttons are enabled only when a value is entered/selected in the “Lab completing study” field, the “Cytogenetic lab specimen number” field, the “If CVS Karyotype abnormal, designate abnormality” field, and the “Abnormal CVS Karyotype result/ Cytogenetic diagnosis (ISCN short form)” field.

FIGURE 4



26. **Lab completing study**: Select name of lab.
27. **Cytogenetic lab specimen number**: Enter lab specimen number into text box.
28. **CVS Karyotype Abnormality:** Select one of the radio buttons (“Down syndrome”, “Trisomy 18”, “Other Abnormal Karyotype”, “Mosaic”) to indicate CVS Karyotype abnormality.
29. **CVS Karyotype result** / **cytogenetic diagnosis**: Enter CVS Karyotype result or cytogenetic diagnosis into textbox.
30. **Buttons**:

    d. **Add to Grid** – adds the CVS Karyotype results to the grid. CVS Karyotype results can be added only if you select “Provided” or “Not Authorized” in the CVS Services.

    e. **Update** – allows the user to update CVS Karyotype results after selecting a record from the CVS Karyotype results grid.

Enter PSR – CVS (Chorionic Villus Sampling) (continued)

f. **Cancel** – clears the entered information in the “CVS Karyotype diagnosis”, “Lab completing study”, “Cytogenetic lab specimen number”, “If CVS Karyotype abnormal, designate abnormality” and “Cytogenetic diagnosis” fields, discarding any unsaved information.

31. **Results** grid displays the results you have added in the fields (12) above.

32. **Buttons**:

f. **Edit** – populates the information for the selected result record in the CVS Karyotype result field allowing you to edit the existing information.

g. **Delete** – deletes the information for the selected result record you have selected from the **CVS Karyotype Result** grid.

h. **Save** – saves the information you have entered in SIS. Clicking **Save** will ensure your work is saved and allow you to continue your work at another time before submitting the PSR. Clicking **Save** will trigger any PSR inconsistencies that exist. These inconsistencies are errors or omissions in the PSR. **A message about the inconsistency will be displayed at the top of the screen**. Any inconsistencies (if present) for CVS will be displayed at the top of the screen. The inconsistency message will direct you to enter some missing or erroneous information or to contact the CCC. Inconsistencies should be corrected before the PSR is submitted to GDB.

i. **Back** – returns you to the previous screen in SIS discarding any unsaved information.

j. **Next** – moves you to any one of the following screen based on appointment status, case trimester, gestational age and special authorization for CVS.

a. **Enter PSR – SubsequentInfo**
b. **Enter PSR – Modified GC**
c. **Enter PSR – US**.

Enter PSR – GC (Modified Genetic Counseling)

Follow Up Center >> Case Summary (PNS) >> Enter PSR - GC

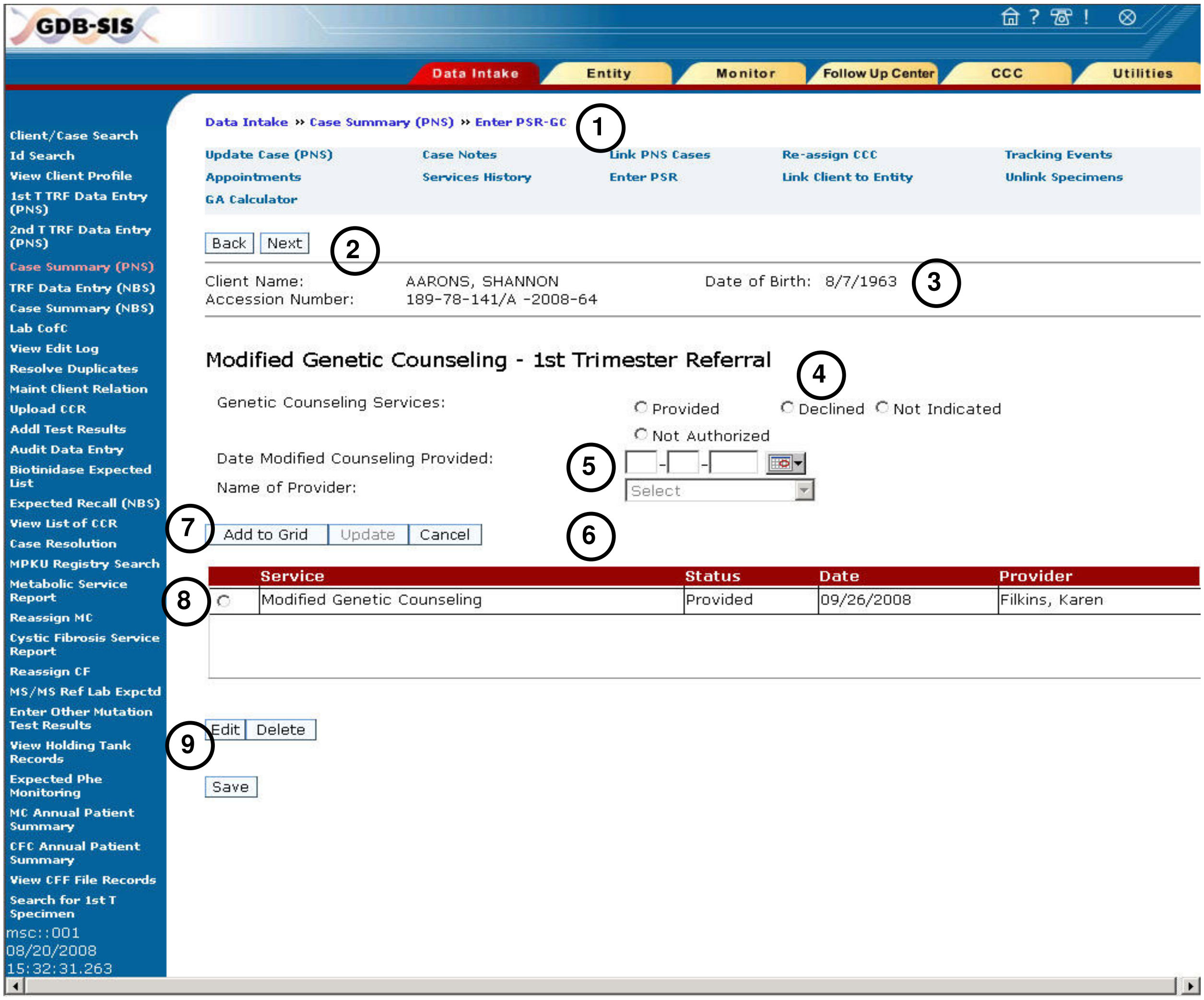
The **Enter PSR - GC** screen will allow you to enter information for Genetic Counseling (Modified) service(s) provided by your PDC. This service is called Modified Genetic Counseling because Interpretation Factors and Final Interpretation cannot be changed during this service. This service is provided when a Genetic Counseling service has already been provided at a PDC for a 1st Trimester specimen, and the patient opts for diagnostic service in the 2nd Trimester (entered on the same 1st Trimester PSR). You may navigate to this screen or other PSR screens by:

1) Clicking the **Next** button to progress through the PSR screens, or

2) Selecting a Modified Genetic Counseling service record from the service grid on the Enter PSR screen and clicking the **Modify Service/Review Results** button.

Enter PSR – GC (Modified Genetic Counseling)

FIGURE 1



1. Navigation and screen name.
2. **Buttons**:
    a. **Back** - returns you to the previous screen in SIS, discarding any unsaved information.
    b. **Next** – moves you to the Enter PSR-US screen.
3. Client information is displayed in a read-only format based on the client profile.
4. **Modified Genetic Counseling** information: The label displays the trimester details. You must select a radio button in the **Genetic Counseling Services** field to indicate whether Genetic Counseling was Provided, Declined, Not Indicated or Not Authorized. You may select the appropriate radio button and add a record to the grid by clicking on the **Add to Grid** button before moving on to the next PSR screen. The **Date Counseling Provided** is the date on which service was provided to the patient.

Enter PSR – GC (Modified Genetic Counseling)

5. **Date Modified Counseling Provided** must be entered if the radio button for "Provided" or "Not Authorized" is selected fro Genetic Counseling services.
6. **Name of Provider** must be selected from the dropdown if the "Provided" or "Not Authorized" radio button is selected for Genetic Counseling services.
7. **Buttons**:
   a. **Add to Grid** – adds the genetic counseling information you have entered to the Genetic Counseling services grid.
   b. **Update** – allows you to save changes to an existing record (a row in the Genetic Counseling grid). After you have selected a record for editing (see 8a below), the **Update** button will become available.
   c. **Cancel** – clears the entered information in the Genetic Counseling fields (3, 4 and 5) discarding any unsaved information.
8. The service grid lists the details of the modified genetic counseling service entered by you. To update a row, click the radio button next to the service you want to edit, click the **Edit** button, then click the **Update** button.
9. **Buttons**:
   a. **Edit** – populates the information for the selected service record in the Genetic Counseling fields allowing you to edit the existing information.
   b. **Delete** – allows you to delete a service record you have selected from the Genetic Counseling service grid.
   c. **Save** - saves the information you have entered in SIS. Clicking **Save** will ensure your work is saved and allow you to continue your work at another time before submitting the PSR. Clicking **Save** will trigger any PSR inconsistencies that exist. These inconsistencies are errors or omissions in the PSR. **A message about the inconsistency will be displayed at the top of the screen**. Any inconsistencies (if present) for Modified Genetic Counseling service will be displayed at the top of the screen. The inconsistency message will direct you to enter some missing or erroneous information or to contact the CCC. Inconsistencies should be corrected before the PSR is submitted to GDB.

Enter PSR – Other/Karyotype

Follow Up Center >> Case Summary (PNS) >> Enter PSR – Other/Karyo

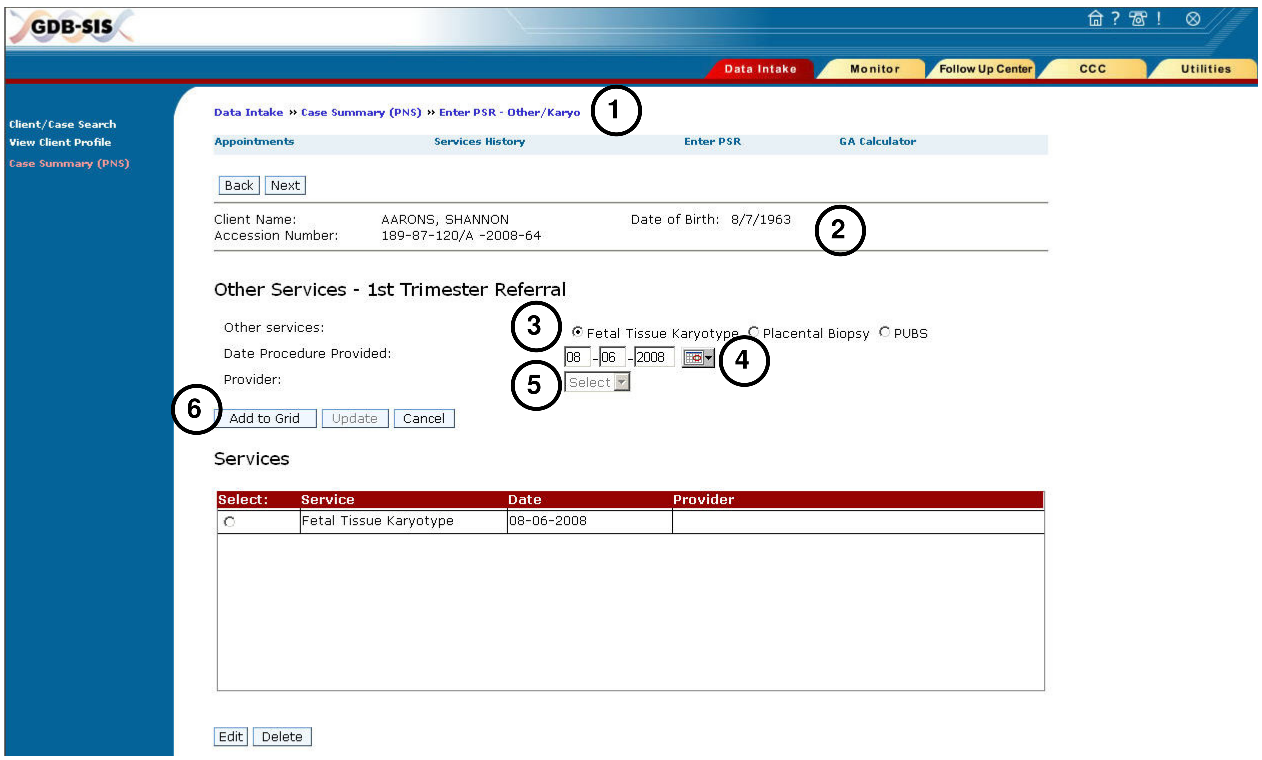
The **Enter PSR – Other/Karyo** screen will allow you to enter information for Fetal Tissue Karyotype, Placental Biopsy and PUBS services provided by your PDC, as well as the Karyotype by one of the procedures or by amniocentesis. You may navigate to this screen or other PSR screens by: 1) clicking the **Next** button to progress through the PSR screens, or 2) selecting a Karyotype service record from the service grid on the Enter PSR screen and clicking the **Add New Service** button.

Services requiring special authorization must be authorized in SIS by GDB staff. Any unauthorized services identified on the PSR will create an inconsistency in SIS.

• The screen was modified to display trimester information.

• New karyotype (Mosaic) display on this screen.

FIGURE 1

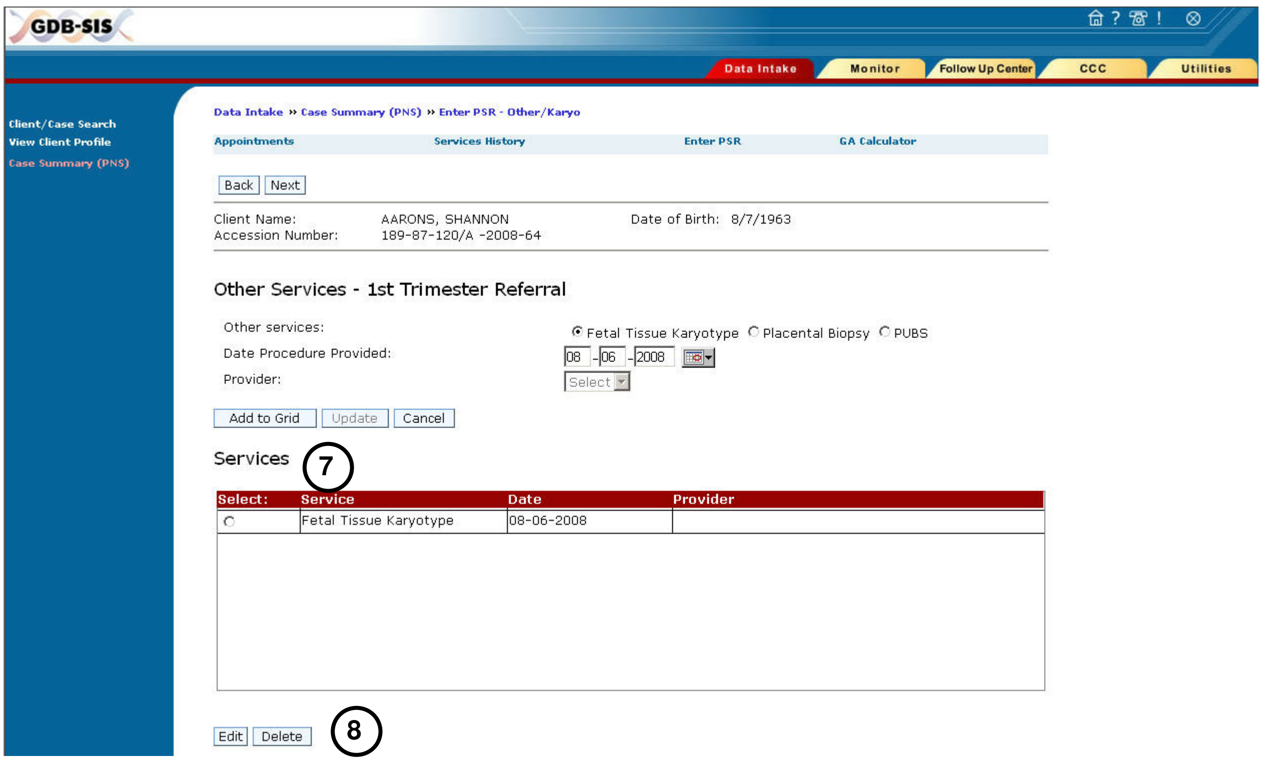


1. Navigation and screen name.
2. Client information is displayed in a read-only format, based on the client profile.
3. **Other Services** information: Select a radio button in the **Other Services** field to indicate which (if any) services Fetal Tissue Karyotype, Placental Biopsy or PUBS) were provided.
4. **Date Procedure Provided**: If you selected one of the Other services, then you must enter the date of the procedure.

Enter PSR – Other/Karyotype (continued)

5. **Provider:** If Placental Biopsy or PUBS was performed, you must enter a **Provider** name from the dropdown.
6. **Buttons**:
   a. **Add to Grid** – adds the other services information you have entered to the Other service grid.
   b. **Update** – allows you to save changes to an existing record (a row in the Other Service grid) after you have selected a record for editing (see 8).
   c. **Cancel** – clears the entered information in the Other Services fields (3-5), discarding any unsaved information.

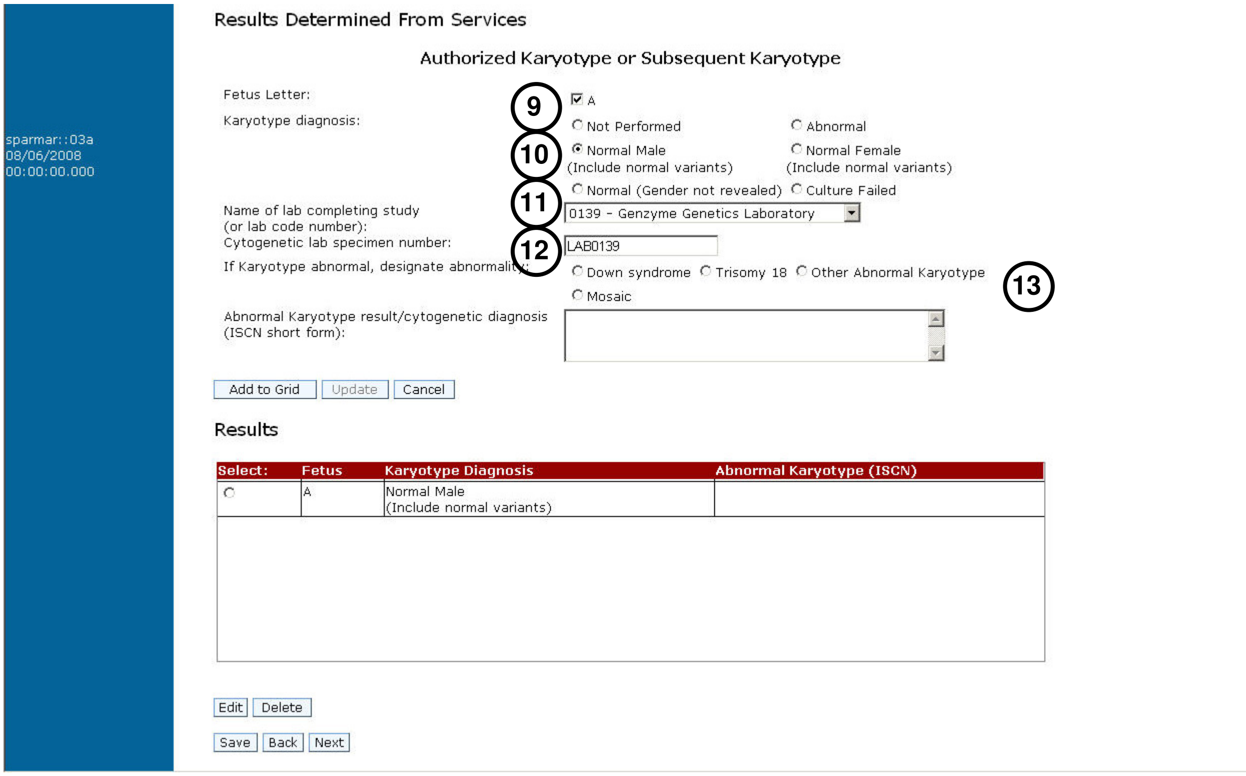
FIGURE 2



7. The **Services** grid lists the other services provided on a specific date as well as the provider. Note: Fetal Tissue Karyotype does not need a Provider name but does need a date of service. To update a row, click the radio button next to the service you want to edit, then click the Edit button.
8. **Buttons:**
   a. **Edit** – populates the information for the selected service record in the Other Services fields, allowing you to edit the existing information.
   b. **Delete** – allows you to delete a service record you have selected from the Other services grid.

Enter PSR – Other/Karyotype (continued)

FIGURE 3



9. Check the **Fetus Letter** under the **Results Determined From Services** and **Authorized Karyotype or Subsequent Karyotype**. If the number of fetuses you entered on the Enter PSR screen in the required field – **Number of Fetuses in the Pregnancy** (include fetal demises) is more than one fetus, a letter will be displayed for each fetus. You must select a fetus letter before adding a record to the Results grid.

10. **Karyotype diagnosis**: Select a radio button that corresponds to the Karyotype result. If an Amniocentesis or another service was performed, but the culture failed, select this option. If the Karyotype diagnosis is Abnormal, select this radio button and proceed to fields 13 and 14 after entering information for fields 11 and 12.

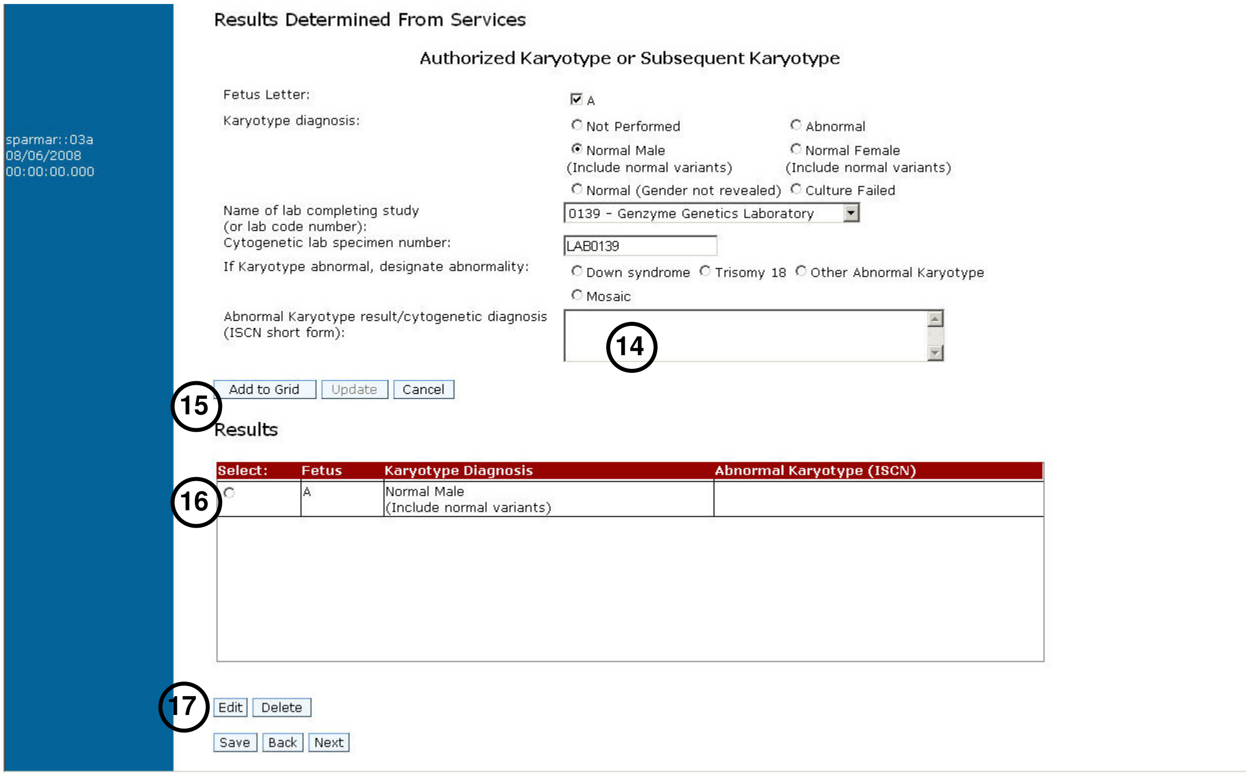
11. **Name of Lab completing study (or lab code number)**: Select one of your PDC's affiliated cytogenetic labs from the dropdown.

12. **Cytogenetic lab specimen number:** Enter the lab specimen number.

13. **If Karyotype abnormal, designate abnormality:** Check one of these boxes to designate the type of Abnormal Karyotype result, then proceed to (ISCN short form) field to enter the abnormal Karyotype nomenclature.

Enter PSR – Other/Karyotype (continued)

FIGURE 4



14. **Abnormal Karyotype result/cytogenetic diagnosis (ISCN short form)**: Enter the nomenclature for the abnormal International Karyotype. Please be certain to use the numbers, letters, commas, parentheses, semicolons, plus and/or minus signs and brackets. Do not use spaces between these numbers, letters and characters.

15. **Buttons:**

    a. **Add to Grid** –adds the entered results to the grid.

    b. **Update** – allows you to save changes to an existing record (a row in the Karyotype grid). After you have selected a record for editing (see 17a below) the **Update** button will become available.

    c. **Cancel** – clears the entered information in 9-14 above discarding any unsaved information.

16. This grid displays Normal Karyotypes and Abnormal Karyotypes with the ISCN short form **Results**.

17. **Buttons:**

    a. **Edit** – allows you to edit the selected results from the Karyotype result.

    b. **Delete** – allows you to delete the selected results from the Karyotype result grid above.

Enter PSR – Other/Karyotype (continued)

c. **Save** – saves the information you have entered in SIS. Clicking **Save** will ensure your work is saved and allow you to continue your work at another time before submitting the PSR. Clicking **Save** will trigger any PSR inconsistencies that exist. These inconsistencies are errors or omissions in the PSR. **A message about the inconsistency will be displayed at the top of the screen.** Any inconsistencies (if present) for Other/Karyotype will be displayed at the top of the screen. The inconsistency message will direct you to enter some missing or erroneous information or to contact the CCC. Inconsistencies should be corrected before the PSR is submitted to GDB.

d. **Back** – returns you to the previous screen in SIS, discarding any unsaved information.

e. **Next** – moves you to the Enter PSR – PregStatus screen

Enter PSR – Pregnancy Status

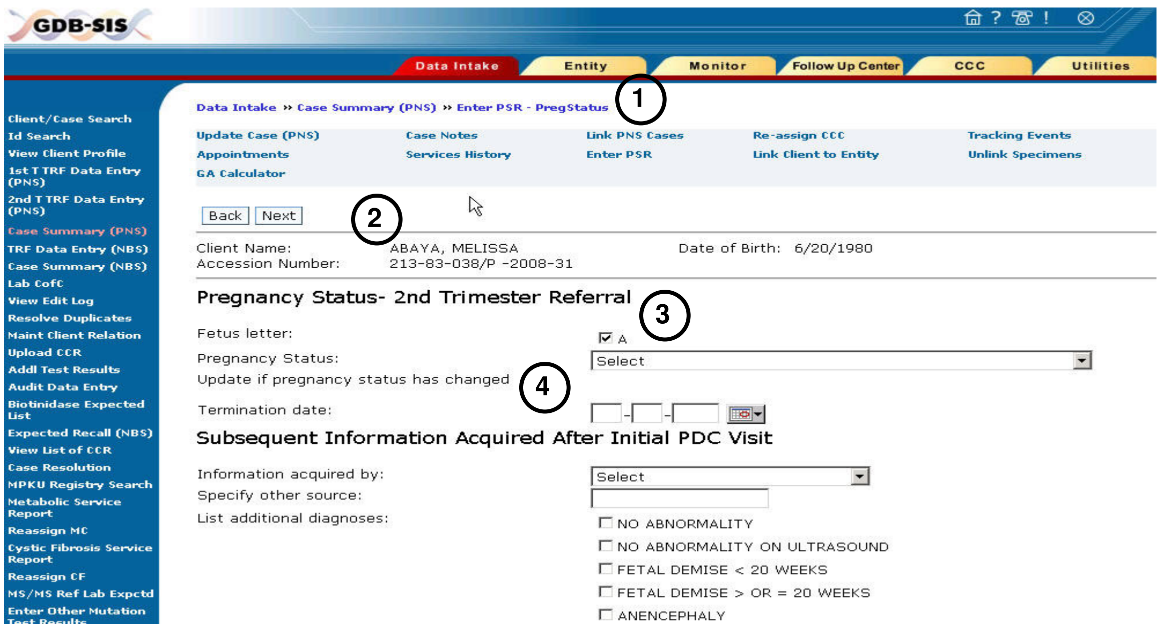
Follow Up Center >> Case Summary (PNS) >> Enter PSR - PregStatus

The **Enter PSR-PregStatus** screen will allow you to enter the status of the pregnancy and patient information gathered after the initial PDC visit. You may navigate to this screen or other PSR screens by:

1) Clicking the **Next** button to progress through the PSR screens, or

2) Selecting a Pregnancy Status service record from the service grid on the Enter PSR screen and clicking the "**Modify Service**/ **Review Results**" button.

FIGURE 1



1. Navigation and screen name.

2. Client information is displayed in a read-only format, based on the client profile. The header label displays the trimester details.

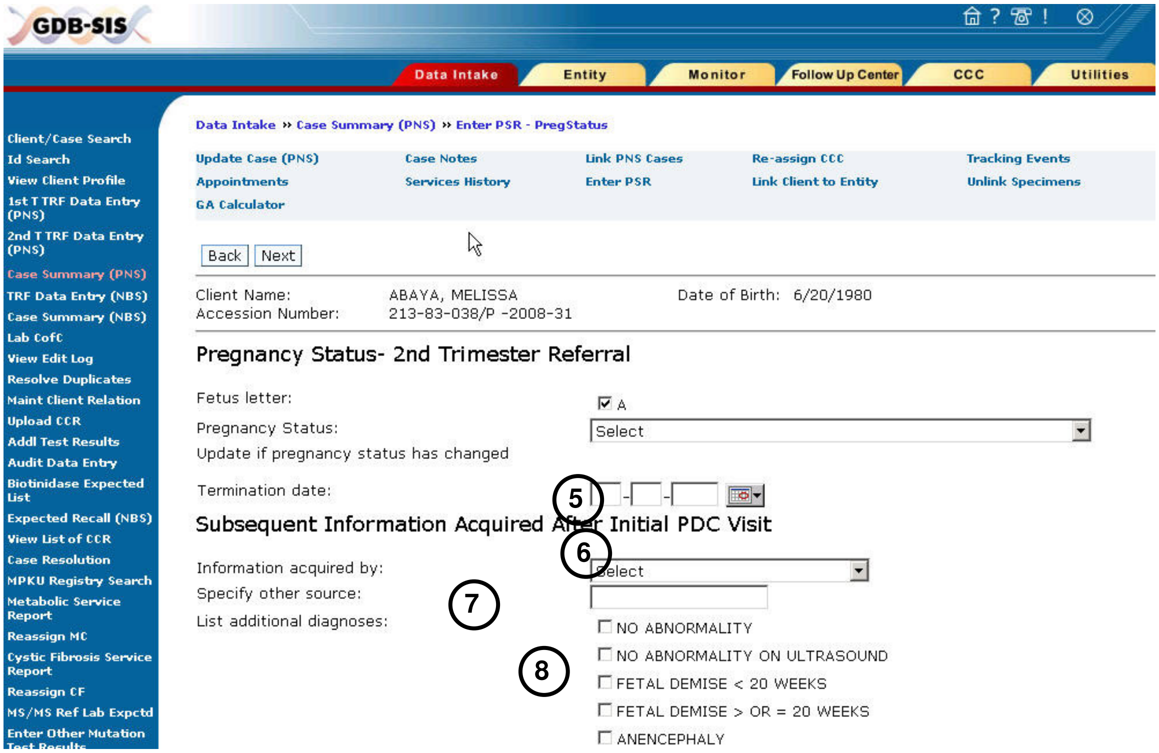
3. Check the **Fetus (Letter)**. If the number of fetuses you entered on the Enter PSR screen in the required field – **Number of Fetuses in the Pregnancy** (include fetal demises) is more than one fetus, a letter will be displayed for each fetus. You must select a fetus letter before adding a record to the Pregnancy status grid.

4. **Status of Pregnancy** is a field that should reflect the state of the pregnancy. Select from the following values:

   a. Continuing Pregnancy
   b. Known elective termination after PDC visit
   c. Patient intends to have fetal reduction
   d. Patient Undecided/Lost to follow-up or unknown
   e. Fetal Loss after PDC visit (Fetal Demise/SAB/missed abortion)
   f. Patient intends to have an Elective Termination

Enter PSR– Pregnancy Status (continued)

FIGURE 2



5. Termination date should only be entered if the pregnancy status is “Known elective termination after PDC visit”, or “Fetal Loss after PDC visit (Fetal Demise/SAB/missed abortion)”.
6. Under **Subsequent Information Acquired After Initial PDC Visit** section on the PSR where you can provide additional information. The **Information Acquired by** dropdown has the following available choices:

“Later Ultrasound”	“Later Karyotype”
“Pathology/Visual Report”	“Other, please specify”

7. **Specify other source** is the text box you should use if you select “Other” in the **Information Acquired by** field.
8. **List additional diagnoses** - Multiple checks are allowed. Be sure to uncheck the box for factors that do not apply when making updates.
9. **Later abnormal Karyotype result/cytogenetic diagnosis:** This textbox is enabled only when “Later Karyotype” is selected in the “Information acquired by” dropdown. Karyotype information can be entered in this field.

Enter PSR– Pregnancy Status (continued)

FIGURE 3

10. **Buttons:**
    a. **Add to Grid** – adds the information you have entered to the pregnancy status grid.
    b. **Update** – allows you to save changes to an existing record (a row in the Pregnancy Status grid. After you have selected a record for editing (see 11 below), the **Update** button will become available.
    c. **Cancel** – clears the entered information in the Pregnancy Status and Subsequent Information fields (3-8); discarding any unsaved information.
11. The pregnancy status grid lists the status of the pregnancy and additional diagnosis and what method it was acquired. Only one row can be added per fetus. To update a row, click the radio button next to the service you want to edit, click the **Edit** button, then click the **Update** button.
12. **Buttons:**
    a. **Edit** – populates the information for the selected service record in the Pregnancy Status and Subsequent Information fields, allowing you to edit the existing information.
    b. **Delete** – allows you to delete a service record you have selected from the pregnancy status grid

Enter PSR– Pregnancy Status (continued)

FIGURE 4

13. **Comments –** A text box is provided for entry of comments.

14. **Buttons:**

    a. **Save** – saves the information you have entered in SIS. Clicking **Save** will ensure your work is saved and allow you to continue your work at another time before submitting the PSR. Clicking **Save** will trigger any PSR inconsistencies that exist. These inconsistencies are errors or omissions in the PSR. **A message about the inconsistency will be displayed at the top of the screen.** Any inconsistencies (if present) for Pregnancy Status will be displayed at the top of the screen. The inconsistency message will direct you to enter some missing or erroneous information or to contact the CCC. Inconsistencies should be corrected before the PSR is submitted to GDB.

    b. **Back** – returns you to the previous screen in SIS, discarding any unsaved information.

    c. **Next –** moves you to the first screen Enter PSR where you can submit the PSR by clicking the **Save** button, then click the **Submit** button.

Enter PSR – SLOS (Smith-Lemli-Opitz Syndrome)

Follow Up Center >> Case Summary (PNS) >> Enter PSR – SLOS

The **Enter PSR –SLOS** screen (Figure 1) will allow you to enter information for Smith-Lemli-Opitz syndrome (SLOS) services provided by your PDC. You may navigate to this screen or other PSR screens by:

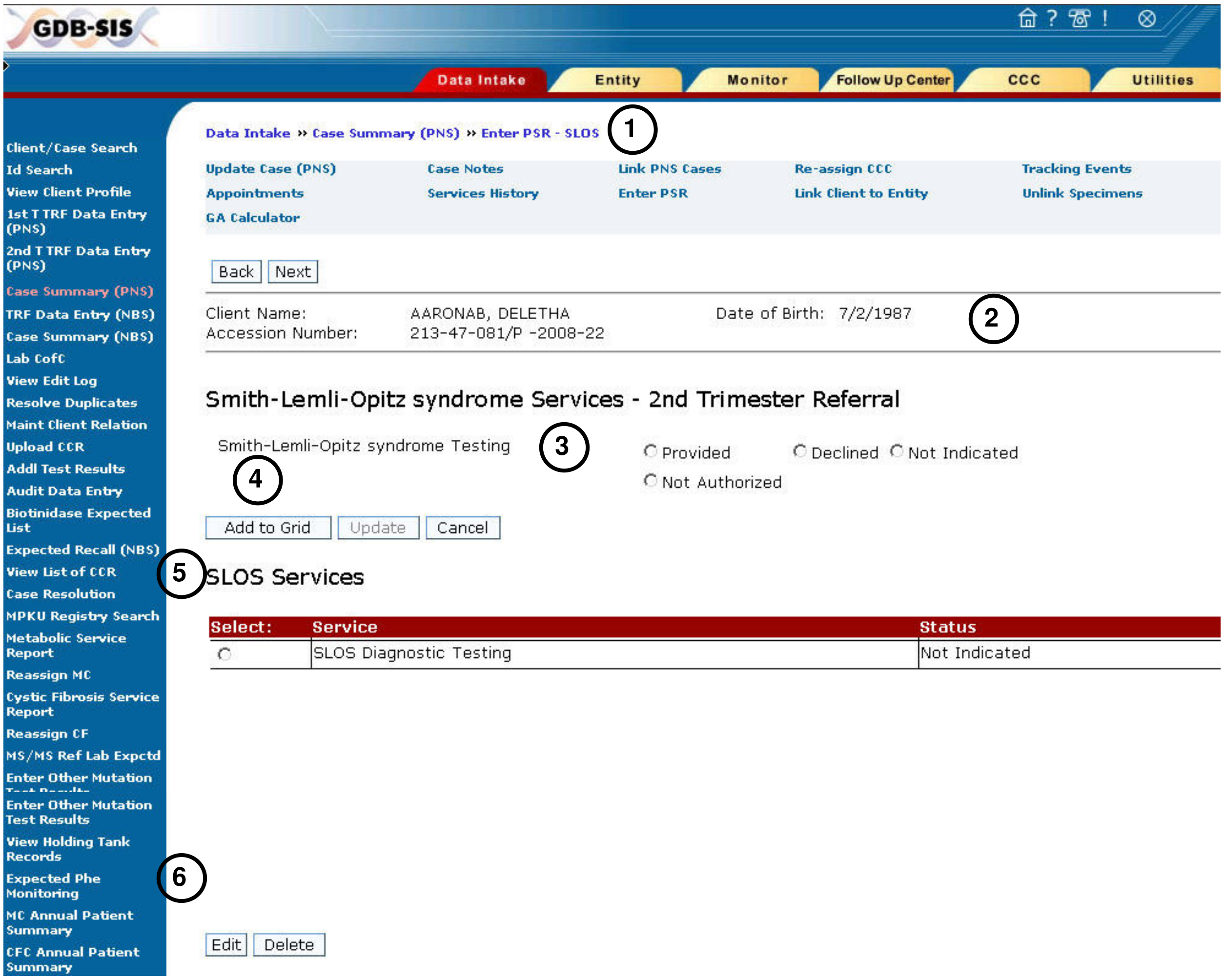
1) Clicking the **Next** button to progress through the PSR screens, or

2) Selecting a SLOS service record from the service grid on the Enter PSR screen and clicking the **Modify Service**/**Review Results** button.

Services requiring special authorization must be authorized in SIS by GDB staff. Any unauthorized services identified on the PSR will create an inconsistency in SIS.

Enter PSR – SLOS (Smith-Lemli-Opitz Syndrome) (continued)

FIGURE 1



1. Navigation and screen name.
2. Client information is displayed in a read-only format based on the client profile. The header label displays the trimester details.
3. **Smith-Lemli-Opitz syndrome Testing:** Select a radio button in the **Smith-Lemli-Opitz syndrome Services** field to indicate whether this service was "Provided", "Not Indicated", "Not Authorized" or "Declined". If the patient's screening indication is not SLOS positive, then select "Not Indicated". If the patient's screening indication is SLOS positive, then select "Provided" or "Declined". You must select the appropriate radio button and add a record to the grid by clicking the **Add to Grid** button before moving on to the next PSR screen.
4. **Buttons:**
   a. **Add to Grid** – adds the SLOS services information you have entered to the SLOS service grid.

Enter PSR – SLOS (Smith-Lemli-Opitz Syndrome) (continued)

b. **Update** – allows you to save changes to an existing record (a row in the SLOS service grid). After you have selected a record for editing (see 6), the **Update** button will become available.

c. **Cancel** – clears the entered information in the SLOS Services fields, discarding any unsaved information.

5. **SLOS Services** grid lists the status of SLOS services. To update a row, click the radio button next to the service you want to edit, click the **Edit** button, then click the **Update** button.

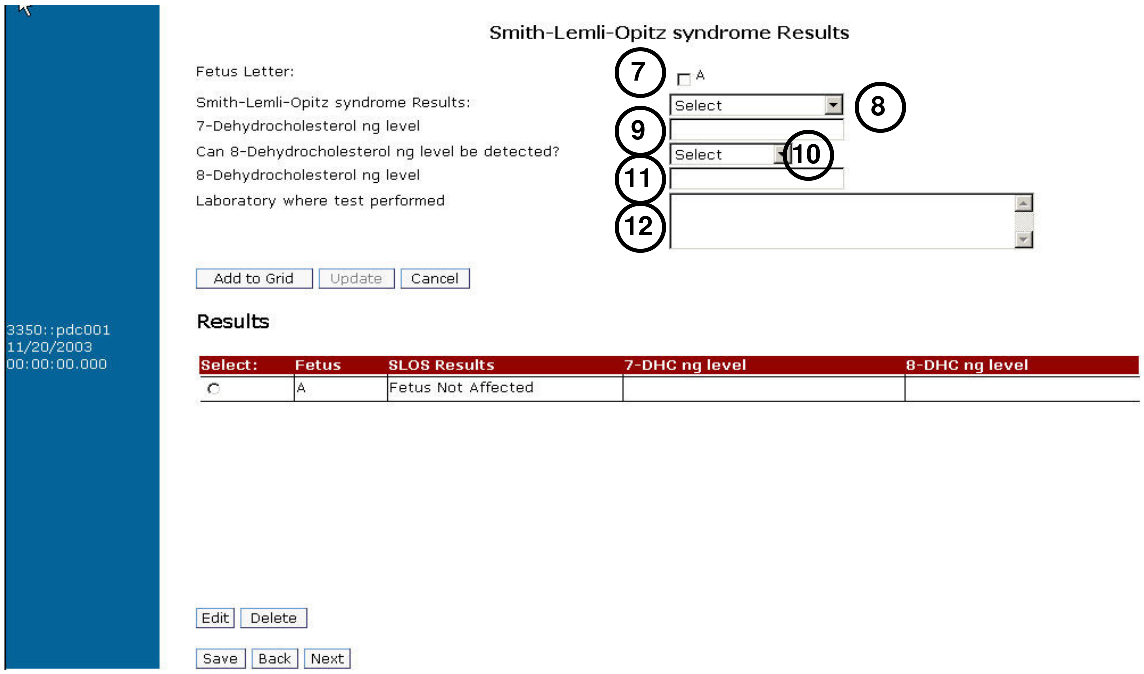
6. **Buttons:**

   a. **Edit** – populates the information for the selected service record in the Smith-Lemli-Opitz Syndrome Services fields, allowing you to edit the existing information.

   b. **Delete** – allows you to delete a service record you have selected from the SLOS Services grid.

Enter PSR – SLOS (Smith-Lemli-Opitz Syndrome) (continued)

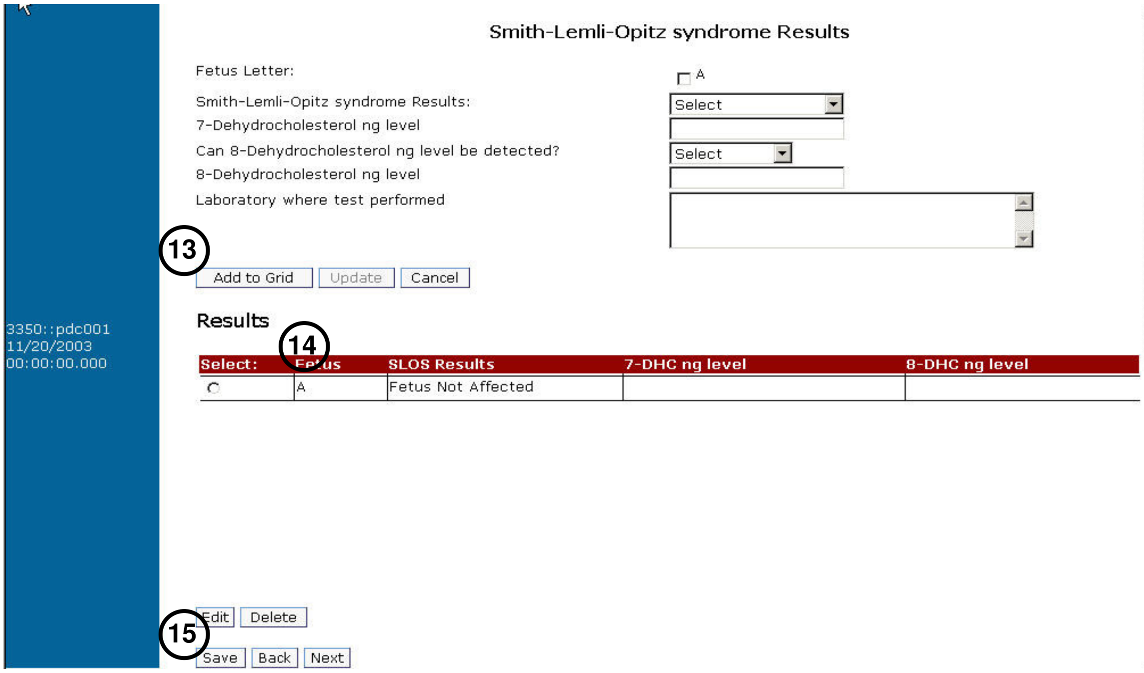
FIGURE 2



7. Check the **Fetus (Letter):** If the Case Summary indicates more than one fetus, a letter will be displayed for each fetus. You must select a fetus letter before adding a record to the Results grid.
8. **Smith-Lemli-Opitz syndrome Results**: Select “Fetus Affected” or “Fetus Not Affected” or “Test Not Performed” only if SLOS Service Status is “Provided” or “Not Authorized”.
9. **7-Dehydrocholesterol ng level**: Enter a value if “Fetus Affected” or “Fetus Not Affected” in **SLOS Results** field.
10. **Can 8-Dehydrocholesterol ng level be detected?**: Select “No” if 8-DHC is below detectable limits and skip the next field (8-DHC ng level). If “Yes”, then proceed to 8-DHC ng level.
11. **8-Dehydrocholesterol ng level:** Enter a value if the response to “Can 8-DHC ng level be detected?” is “Yes”.
12. **Laboratory where test performed:** Select the Kennedy-Krieger Institute from the dropdown; you only need to select this laboratory if SLOS service status is “Provided” or “Not Authorized”.

Enter PSR – SLOS (Smith-Lemli-Opitz Syndrome) (continued)

FIGURE 3



13. **Buttons:**

    a. **Add to** Grid – adds the SLOS results information you have entered to the SLOS results grid.

    b. **Update** – allows you to save changes to an existing record (a row in the SLOS results grid). After you have selected a record for editing (see 15), the **Update** button will become available.

    c. **Cancel** – clears the entered information in the SLOS Results fields, discarding any unsaved information.

14. **Results** grid: Displays SLOS services results. Only one results record may be added to the grid per fetus. To update a row, click the radio button next to the service you want to edit, click the **Edit** button, then click the **Add to Grid** button.

15. **Buttons:**

    a. **Edit** – populates the information for the selected result record in the SLOS results fields allowing you to edit the existing information.

    b. **Delete** – allows you to delete a result record you have selected from the **SLOS Results** grid.

Enter PSR – SLOS (Smith-Lemli-Opitz Syndrome) (continued)

c. **Save** – saves the information you have entered in SIS. Clicking **Save** will ensure your work is saved and allow you to continue your work at another time before submitting the PSR. Clicking **Save** will trigger any PSR inconsistencies that exist. These inconsistencies are errors or omissions in the PSR. **A message about the inconsistency will be displayed at the top of the screen**. Any inconsistencies (if present) for SLOS Testing services will be displayed at the top of the screen. The inconsistency message will direct you to enter some missing or erroneous information or to contact the CCC. Inconsistencies should be corrected before the PSR is submitted to GDB.

d. **Back** – returns you to the previous screen in SIS discarding any unsaved information.

e. **Next** – moves to Enter PSR – Karyo screen.

Enter PSR – US (Ultrasonography)

Follow Up Center >> Case Summary (PNS) >> Enter PSR - US

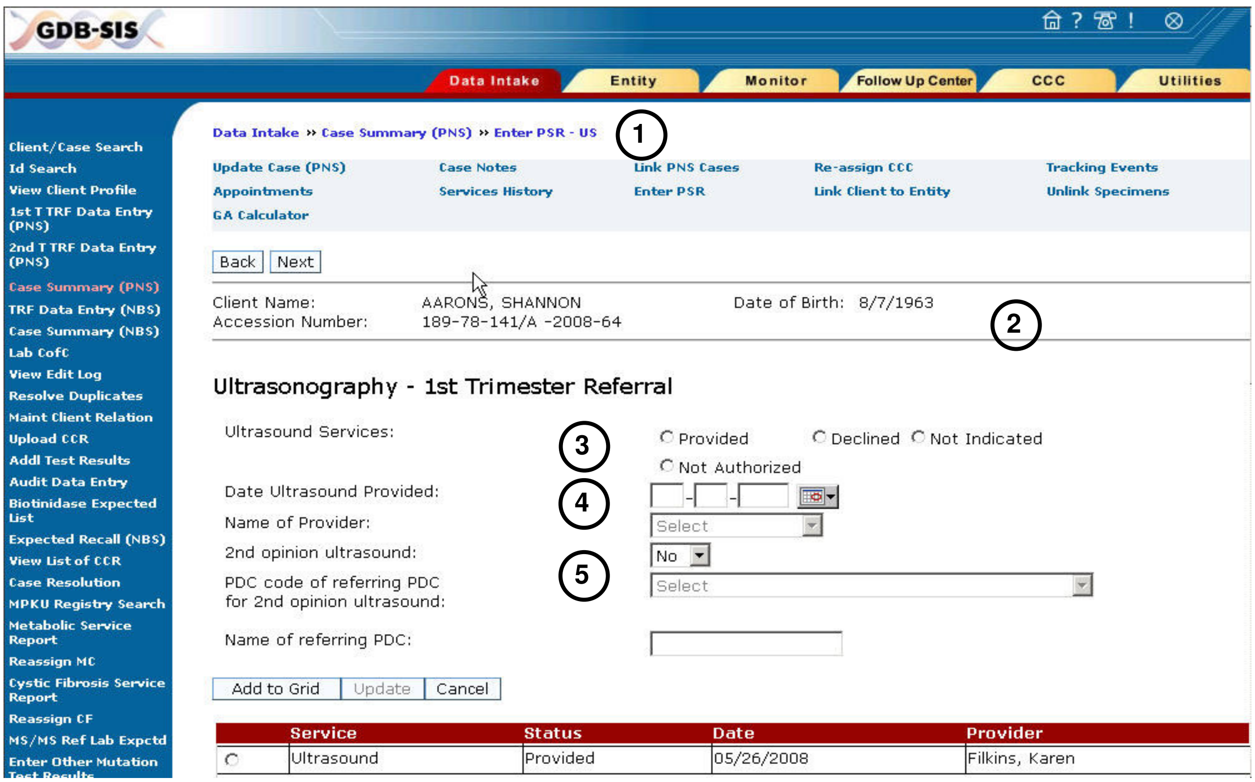
The **Enter PSR - US** screen (**FIGURE 1**) allows you to enter information for Ultrasonography service(s) provided by your PDC. You may navigate to this screen or other PSR screens by:

1) Clicking the **Next** button to progress through the PSR screens, or

2) Selecting an Ultrasonography service record from the service grid on the Enter PSR screen and clicking the **Modify Service**/ **Review Results** button.

Services requiring special authorization must be authorized in SIS by GDB staff. Any unauthorized services identified on the PSR will create an inconsistency in SIS.

FIGURE 1



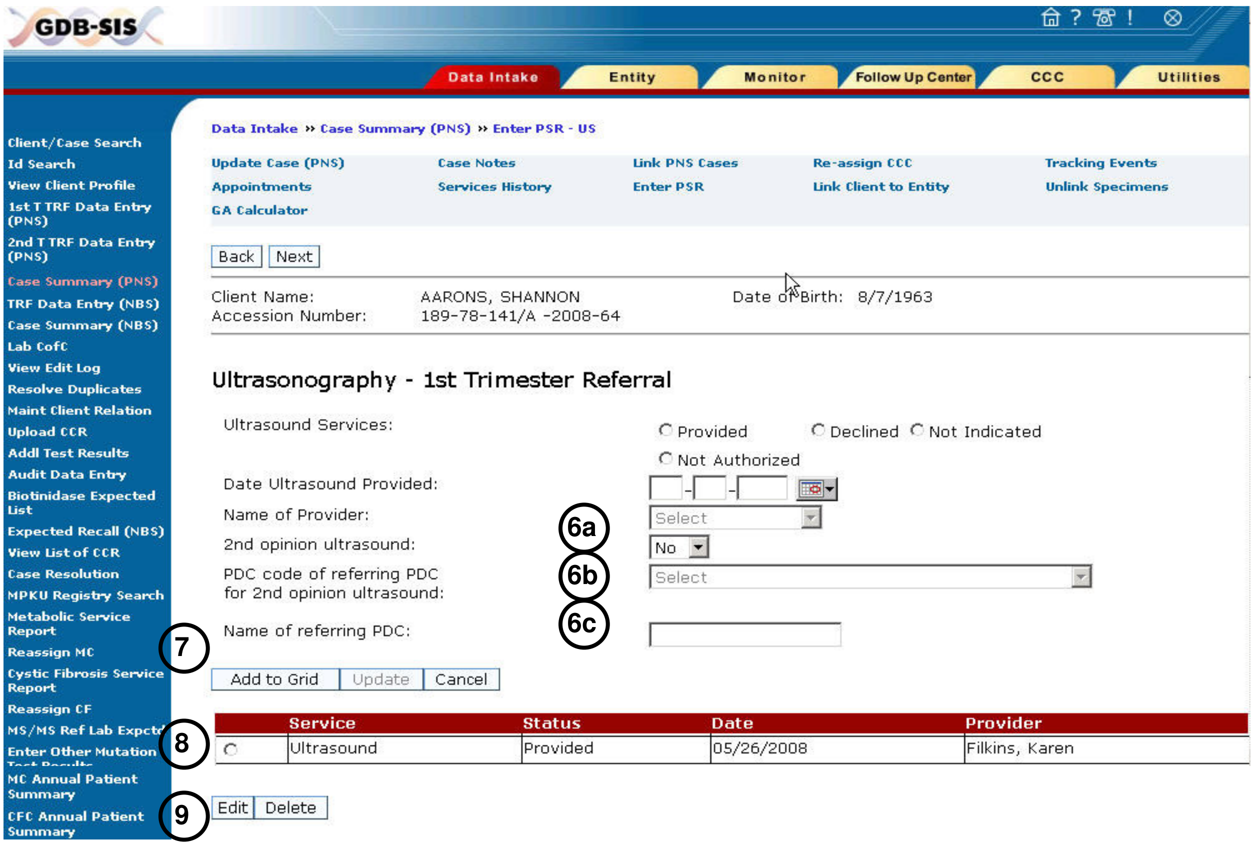
1. Navigation and screen name.
2. Client information is displayed in a read-only format based on the client profile. The label displays trimester information.
3. **Ultrasonography** information: You must select a radio button in the **Ultrasound Services** field to indicate which (if any) services were "Provided", "Declined", "Not Indicated" or "Not Authorized". You must select the appropriate button for the Ultrasound Service Status and add a record to the grid by clicking on the **Add to Grid** button before moving on to the next PSR screen.

Enter PSR – US (Ultrasonography) (continued)

4. **Date Ultrasound Provided** must be entered if the radio button for "Provided", or "Not Authorized" is selected for Ultrasound Service.

5. **Name of Provider** must be selected from the dropdown if "Provided" or "Not Authorized" is selected for Ultrasound Services.

FIGURE 2



6. **2nd Opinion Ultrasound**
   a. 2nd Opinion Ultrasound should be answered "Yes" or "No". 2nd Opinion Ultrasound requires a special authorization by GDB staff.
   b. If 2nd Opinion Ultrasound is "Yes", then you need to enter the PDC Code of the referring PDC for 2nd Opinion Ultrasound.
   c. The Name of the PDC will be populated based on the entered PDC Code of the referring PDC.

7. **Buttons**
   a. **Add to Grid** – adds the Ultrasound information you have entered to the Ultrasound service grid.
   b. **Update** – allows you to save changes to an existing record (a row in the Ultrasound grid). After you have selected a record for editing (see 6a), the **Update** button will become available.

Enter PSR – US (Ultrasonography) (continued)

c. **Cancel** – clears the entered information in the Ultrasound fields (3, 4, 5, 6a, 6b, 6c), discarding any unsaved information.

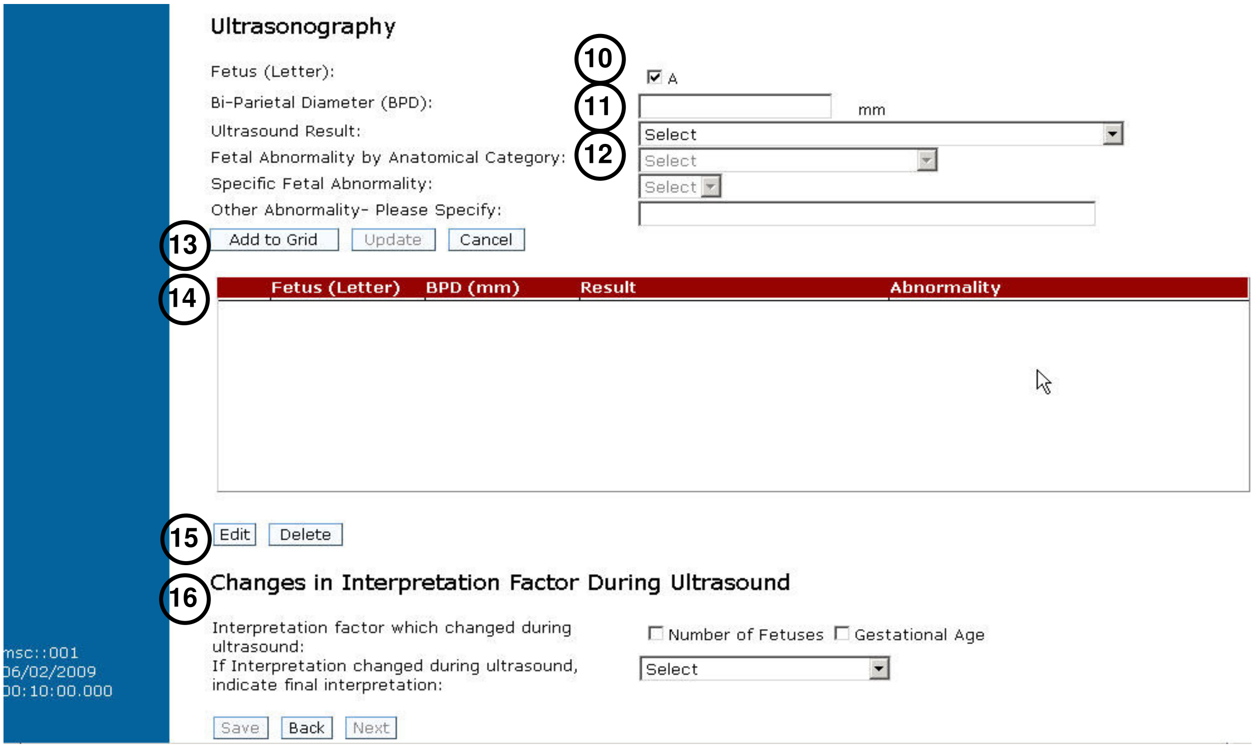
8. The service grid lists the details of Ultrasonography service(s) that were entered by you. To update a row, click the radio button next to the service you want to edit, click the **Edit** button, then click the **Update** button.

9. **Buttons:**

   a. **Edit** – populates the information for the selected service record in the Ultrasonography fields allowing you to edit the existing information.

   b. **Delete** – allows you to delete a service record you have selected from the Ultrasound service grid.

FIGURE 3



10. Check the **Fetus (Letter)**. If the number of fetuses you entered on the Enter PSR screen in the required field **Number of fetuses in the pregnancy** (include fetal demises) is more than one fetus, a letter will be displayed for each fetus. For example, for 2 fetuses there will be a box A and box B. You must select a fetus letter before adding a record to the Ultrasound results grid.

11. Enter the **Bi-Parietal Diameter (BPD)** in millimeters. If you attempt to add a record to the results grid without indicating the BPD, you will receive a warning "Bi-Parietal Diameter is not entered. Do you want to continue?" You may continue by clicking the **OK** button. The range of millimeters is 16-78. You should enter a BPD for each fetus.

Enter PSR – US (Ultrasonography) (continued)

12. **Ultrasound Result**

    a. **Ultrasound Result** must be selected if the radio button for "Provided" or "Not Authorized" is selected for Ultrasound service. If "Other Ultrasound Abnormality" is selected under **Ultrasound Result** then proceed to **Fetal Abnormality by Anatomical Category**.

    b. **Fetal Abnormality by Anatomical Category** is divided into the following categories:

Central Nervous System	Face	Neck
Heart/Lung	Abdomen	Skeletal System
Kidney/Urinary	Bladder/Pelvis	Size
Growth	Overall Appearance	Placenta
Amniotic Fluid Volume	Umbilical Cord	

    You select one of these categories at a time then proceed to select the specific fetal abnormality.

    c. **Specific Fetal Abnormality** is a list of abnormalities within that specific anatomical category. For example, under Fetal Abnormality by Anatomical Category - Heart/Lung the specific fetal abnormality Atrial Septal Defect (ASD) can be selected. (See the complete list of Anatomical Categories under the Specific fetal abnormality listed under each category).

13. **Buttons:**

    a. **Add to Grid** – adds the Ultrasonography results you have entered to the service grid.

    b. **Update** – allows you to save changes to an existing record (a row in the Ultrasound grid). After you have selected a record for editing (see 16 below) the **Update** button will become available(3, 4, 5, 6a, 6b, 6c).

    c. **Cancel** – clears the entered information in the Ultrasonography result fields discarding any unsaved information.

14. **Ultrasonography Results** grid.

15. **Buttons**:

    a. **Edit** – populates the information for the selected result record into the results fields allowing you to edit the existing information.

    b. **Delete** – allows you to delete a result record you have selected from the Ultrasound results grid.

    c. **Save** - saves the information you have entered in SIS. Clicking **Save** will ensure your work is saved and allow you to continue your work at another time before submitting the PSR. Clicking **Save** will trigger any PSR inconsistencies that exist. These inconsistencies are errors or omissions in the PSR. **A message about the inconsistency will be displayed at the top of the screen**. Any inconsistencies (if present) for Ultrasonography service will be displayed at the top of the screen.

Enter PSR – US (Ultrasonography) (continued)

The inconsistency message will direct you to enter some missing or erroneous information or to contact the CCC.

Inconsistencies should be corrected before the PSR is submitted to GDB.

d. **Back** – returns you to the previous screen in SIS, discarding any unsaved information.

e. **Next** – moves you through each service screen

16. **Changes in Interpretation factors during Ultrasound (visible to second Trimester cases only)**:

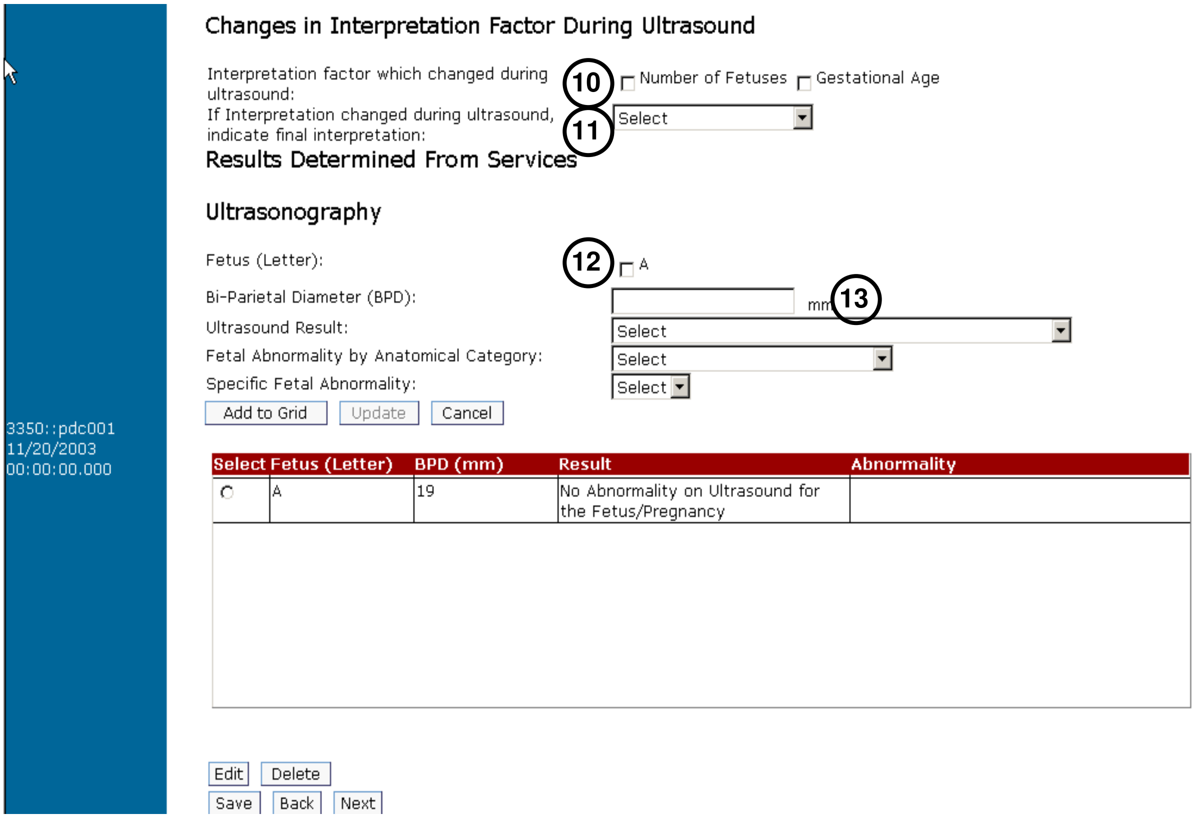
a. Check the boxes to indicate the interpretation factor(s) that changed during ultrasound. Multiple checks are allowed. If you are updating information be sure to uncheck any boxes that do not apply.

Note: checking these boxes will not update any information on the Case Summary. You must contact the Case Coordination Center (CCC).

b. **If Interpretation changed during Ultrasound, indicate final interpretation** by selecting “Negative” or “Too Early” or “Too Late” or “Other Screen Positive” or “Too Early-High AFP” or “Pregnancy Not Screenable” or “Too Late-High AFP”. Use this only if the interpretation changed during Ultrasound.

Enter PSR – US (Ultrasonography) (continued)

FIGURE 3



17. Check the boxes to indicate the interpretation factor(s) that changed during ultrasound. Multiple checks are allowed. If you are updating information be sure to uncheck any boxes that do not apply.

    Note: checking these boxes will not update any information on the Case Summary. You must contact the Case Coordination Center (CCC).

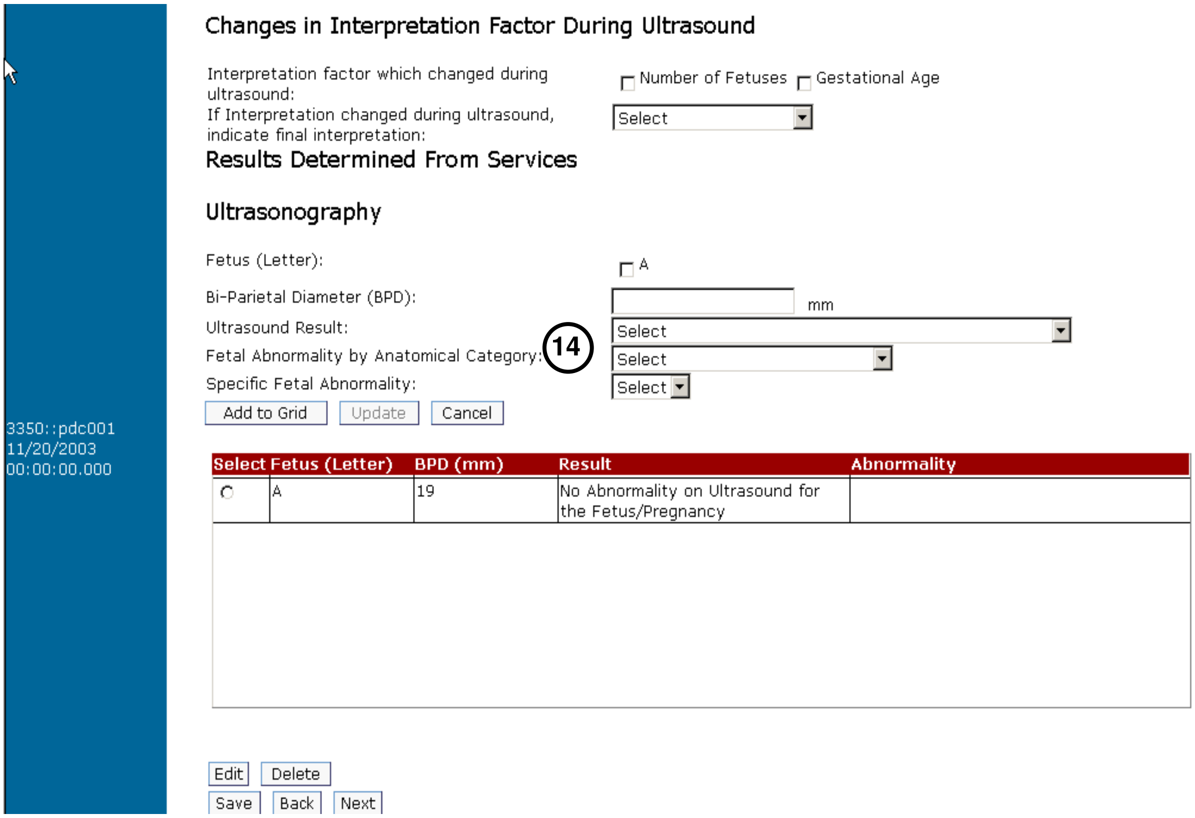
18. **If Interpretation changed during Ultrasound, indicate final interpretation** by selecting "Negative" or "Too Early" or "Too Late". Use this only if the interpretation changed during Ultrasound.

19. Check the **Fetus (Letter)**. If the number of fetuses you entered on the Enter PSR screen in the required field **Number of fetuses in the pregnancy** (include fetal demises) is more than one fetus, a letter will be displayed for each fetus. For example, for 2 fetuses there will be a box A and box B. You must select a fetus letter before adding a record to the Ultrasound results grid.

20. Enter the **Bi-Parietal Diameter (BPD)** in millimeters. If you attempt to add a record to the results grid without indicating the BPD, you will receive a warning "Bi-Parietal Diameter is not entered. Do you want to continue?" You may continue by clicking the **OK** button. The range of millimeters is 16-78. You should enter a BPD for each fetus.

Enter PSR – US (Ultrasonography) (continued)

FIGURE 4



21. **Ultrasound Result**

a. **Ultrasound Result** must be selected if the radio button for “Provided” or “Not Authorized” is selected for Ultrasound service. If “Other Ultrasound Abnormality” is selected under **Ultrasound Result** then proceed to **Fetal Abnormality by Anatomical Category**.

b. **Fetal Abnormality by Anatomical Category** is divided into the following categories:

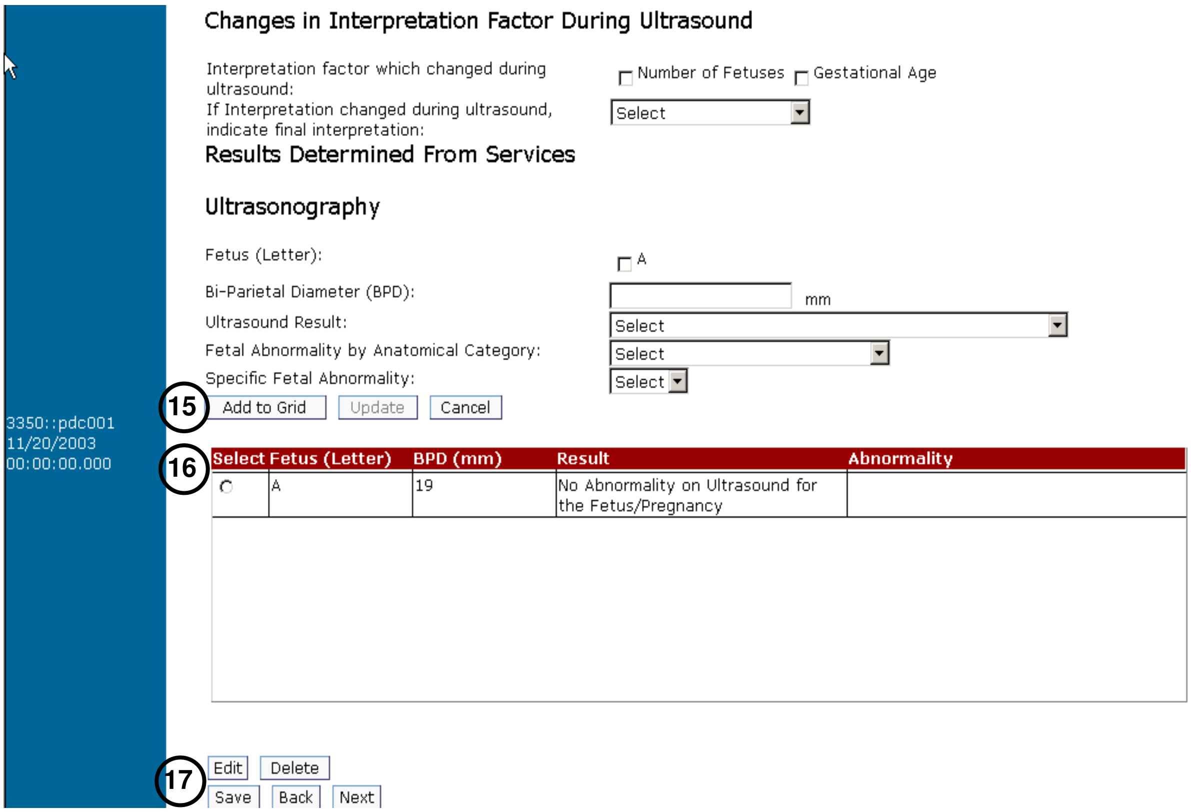
Central Nervous System	Face	Neck
Heart/Lung	Abdomen	Skeletal System
Kidney/Urinary	Bladder/Pelvis	Size
Growth	Overall Appearance	Placenta
Amniotic Fluid Volume	Umbilical Cord	

You select one of these categories at a time then proceed to select the specific fetal abnormality.

c. **Specific Fetal Abnormality** is a list of abnormalities within that specific anatomical category. For example, under Fetal Abnormality by Anatomical Category - Heart/Lung the specific fetal abnormality Atrial Septal Defect (ASD) can be selected. (See the complete list of Anatomical Categories under the Specific fetal abnormality listed under each category).

Enter PSR – US (Ultrasonography) (continued)

FIGURE 5



22. **Buttons:**
    - d. **Add to Grid** – adds the ultrasonography results you have entered to the service grid.
    - e. **Update** – allows you to save changes to an existing record (a row in the Ultrasound grid). After you have selected a record for editing (see 16 below) the **Update** button will become available (3, 4, 5, 6a, 6b, 6c).
    - f. **Cancel** – clears the entered information in the Ultrasonography result fields discarding any unsaved information.
23. **Ultrasonography Results** grid.
24. **Buttons**:
    - f. **Edit** – populates the information for the selected result record into the results fields allowing you to edit the existing information.
    - g. **Delete** – allows you to delete a result record you have selected from the Ultrasound results grid.

Enter PSR – US (Ultrasonography) (continued)

h. **Save** - saves the information you have entered in SIS. Clicking **Save** will ensure your work is saved and allow you to continue your work at another time before submitting the PSR. Clicking **Save** will trigger any PSR inconsistencies that exist. These inconsistencies are errors or omissions in the PSR. **A message about the inconsistency will be displayed at the top of the screen.** Any inconsistencies (if present) for Genetic Counseling services will be displayed at the top of the screen. The inconsistency message will direct you to enter some missing or erroneous information or to contact the CCC.

Inconsistencies should be corrected before the PSR is submitted to GDB.

i. **Back** – returns you to the previous screen in SIS, discarding any unsaved information.

j. **Next** – moves you through each service screen.

Entity Profile

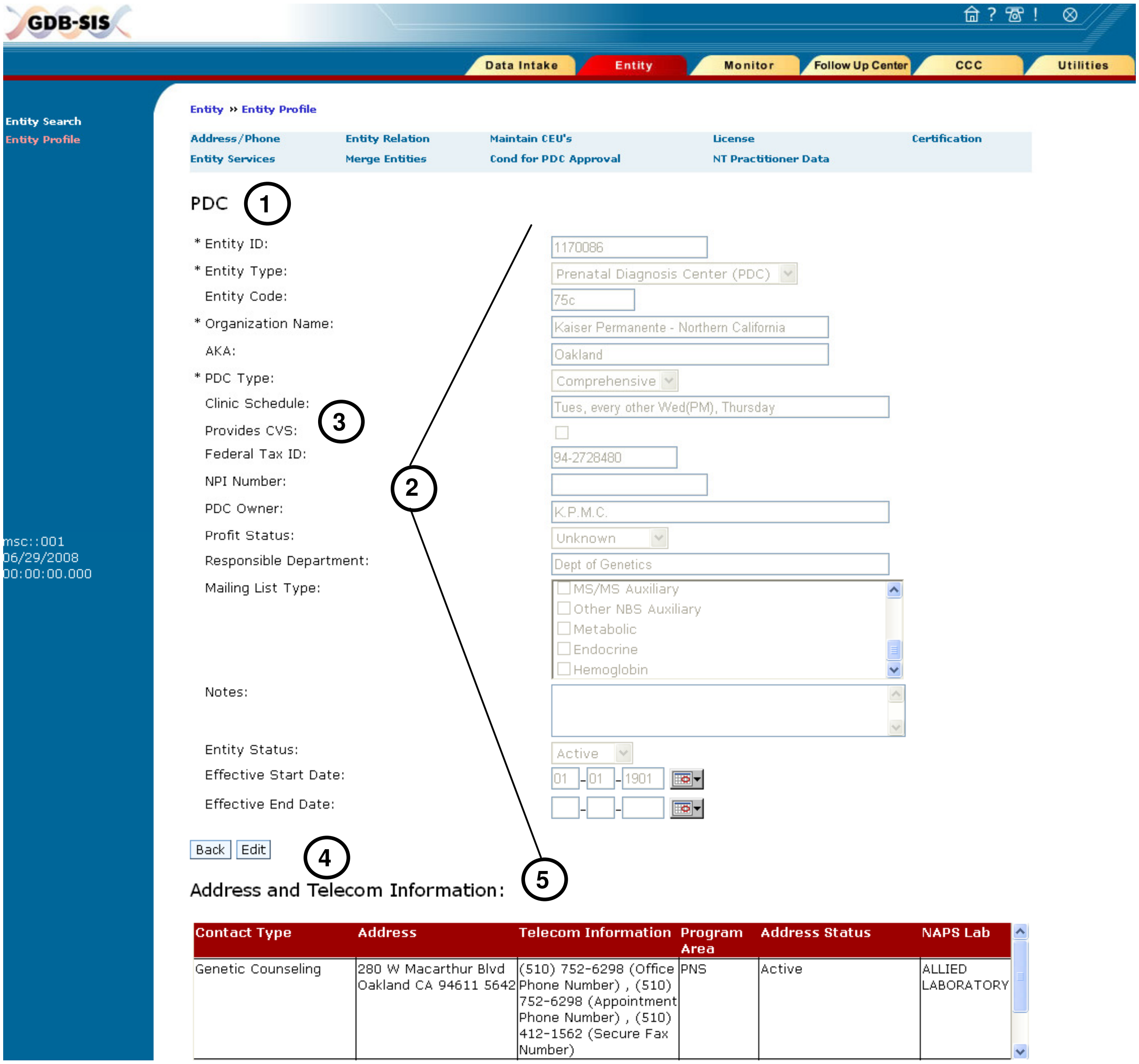
Entity >> Entity Profile

The **Entity Profile** screen is used to view and edit information about an entity in SIS. The fields displayed in the Entity Profile screen depend upon the Entity Type. For example, when viewing a PDC-type entity the Organization Name field is displayed whereas, when viewing a person-type entity, the person's First Name and Last Name are displayed.

You can navigate to the **Entity Profile** screen by searching for an entity on the Entity Search screen by clicking the radio button next to the entity record and clicking the View Entity Profile button. Following is an example of one entity type.

Entity Profile (continued)

FIGURE 1

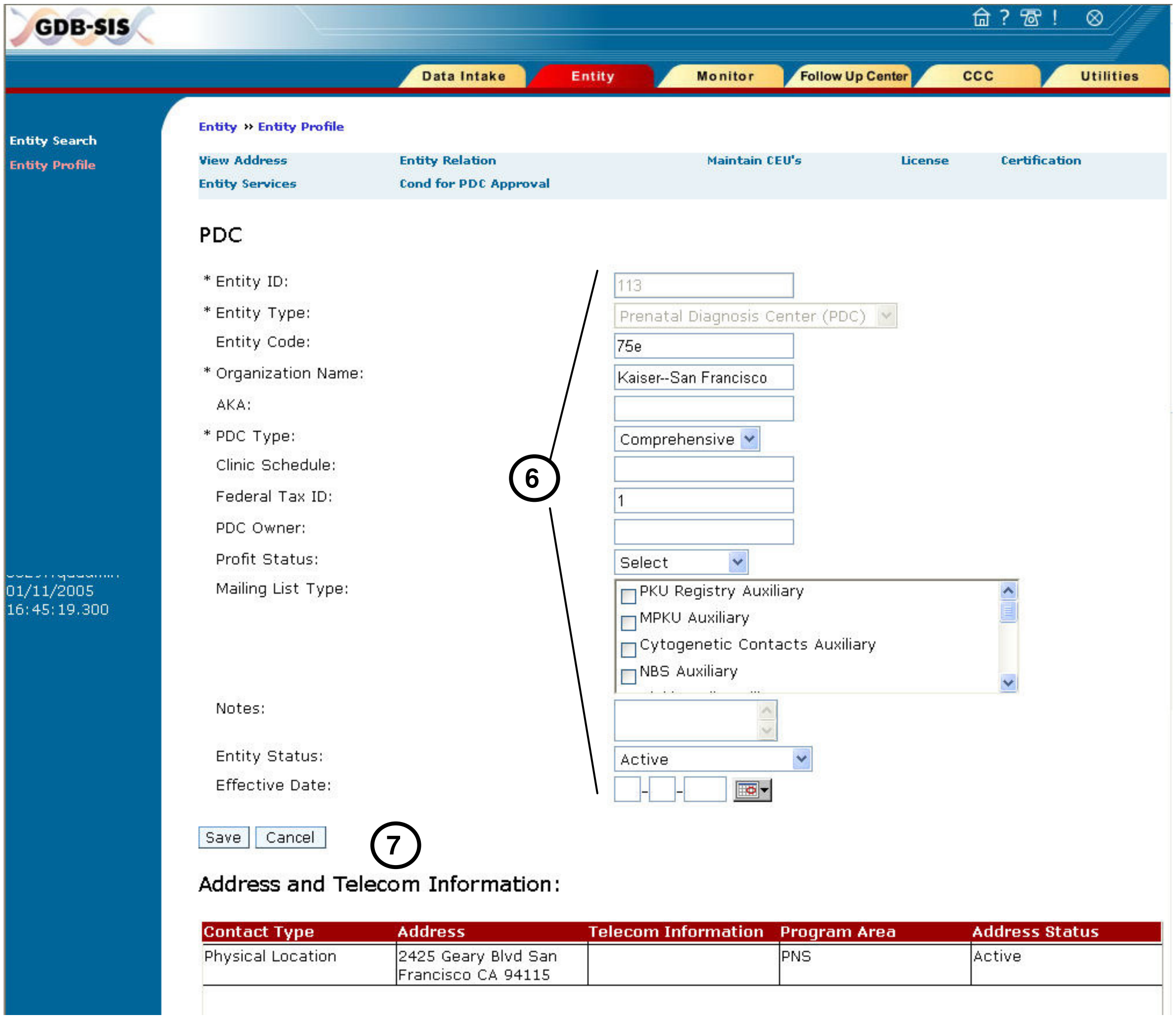


The entity type is displayed at the top of the screen.

1. When the Entity Profile screen is initially loaded, information about the entity is displayed in read-only mode.
2. The new check box “Provides CVS” is displayed here. This field ensures whether the PDC will provide CVS or not.
3. Click the **Edit** button to make changes to the entity information (see **FIGURE 2**).
4. **Address and Telecom Information** grid displays contact information. To update address or telecom information, use the View Address 3rd level link at the top of the screen.

Entity Profile (continued)

FIGURE 2



5. Update the information for the entity in the fields provided.

   Note: Certain entity types have fields related to license information. For information about the format requirements for License Number entries, refer to Appendix G – License Number Format Structure.

6. **Buttons:**

   a. Click the **Save** button to save the changes you made to the entity profile.

   b. Click the **Cancel** button to return to the entity profile in read-only mode discarding any unsaved information.

Entity Relationships

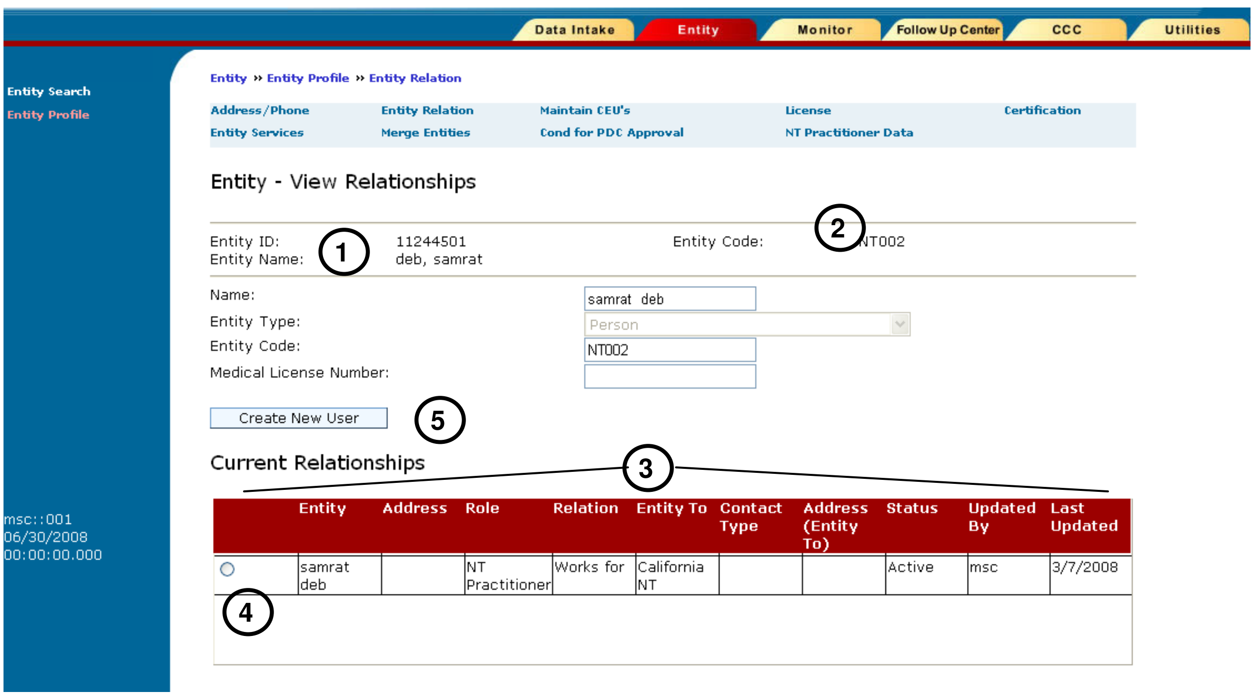
Entity >> Entity Profile >> Entity Relation

The **Entity Relation** screen is used to view all existing relationships for an entity. From this screen the user can navigate to the Maintain Relationships screen where entity relationships can be created and edited. A relationship indicates a connection or link between two entities, two clients or an entity and a client. For example:

- Entity/Entity <-> Hospital/Clinician
- Client/Client <-> Parent/Child
- Entity/Client <-> Physician/Client

Note: SIS restricts the type of entity relationships that can be created**.** For more information on Entity Relationships, see Appendix F - Entity Relationship Matrix.

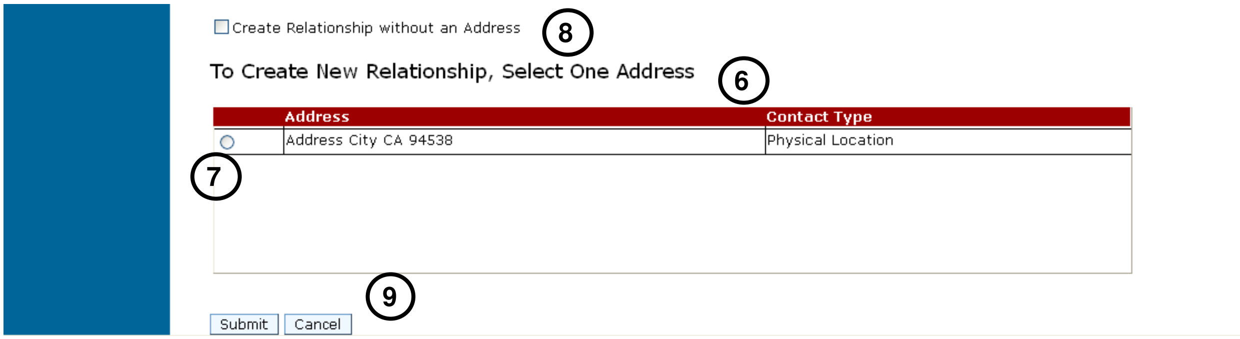
FIGURE 1



1. Information about the selected entity is displayed in a read-only format based on the entity profile.
2. The user can create relationships for NT Practitioners, e.g. in this case the entity is a NT practitioners and the user can create a relationship for it.
3. Any existing relationships are displayed in the **Current Relationships** grid.
4. Click the radio button next to a current relationship to select it for editing.
5. Click on Create New User button to navigate to the Create New User screen, where you can create a new user for the selected entity.

Entity Relationships (continued)

FIGURE 2



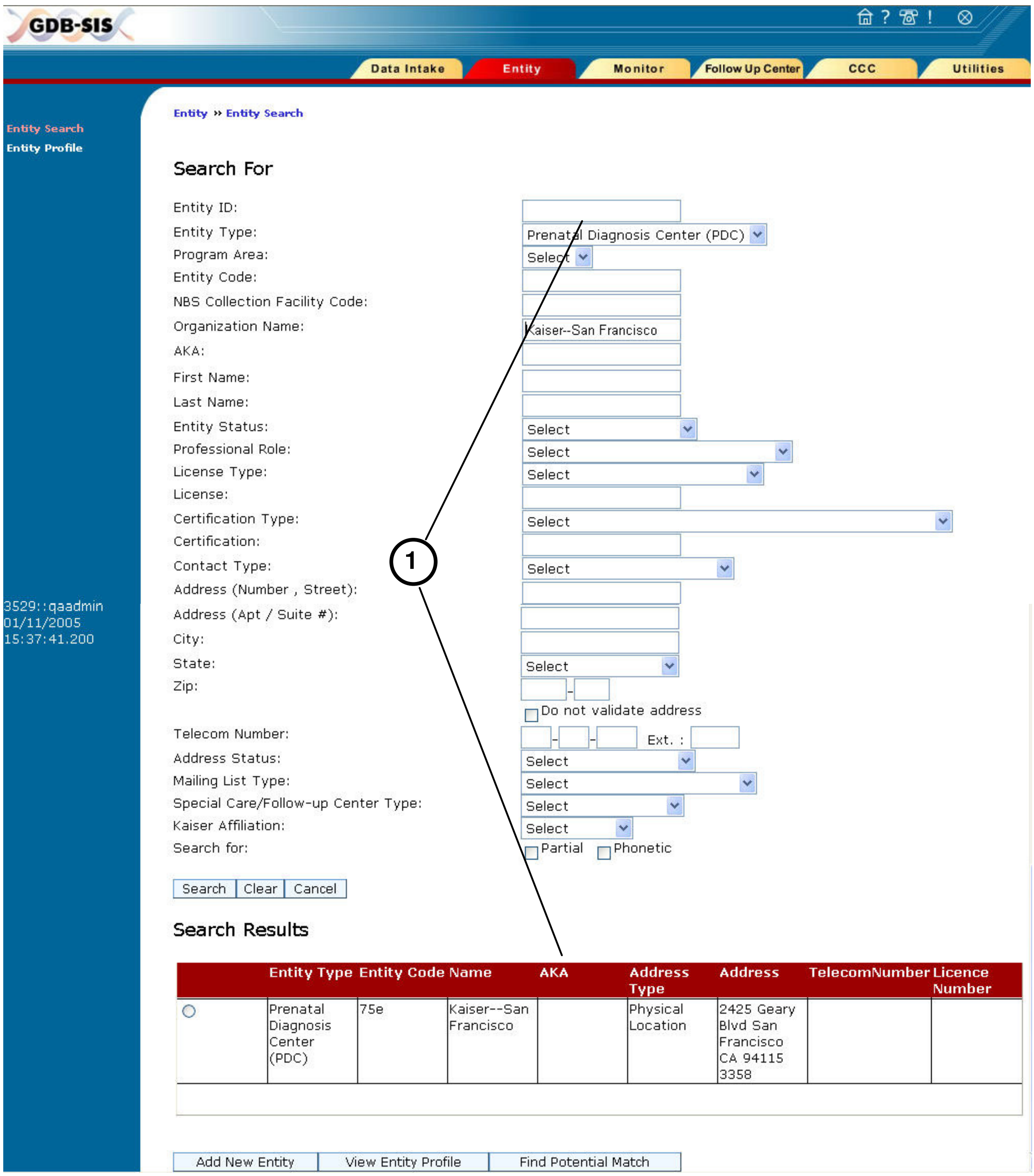
6. In order to create a new relationship for an entity an address must exist for the entity. All address records for the selected entity are displayed in the **To Create New Relationships, Select One Address** grid.
7. Click the radio button next to the desired address to select it as the address for creation of a new relationship.
8. When you check the checkbox “Create Relationship without an Address”, the address in the below grid becomes read only. After that if you click on submit button, then it will navigate to the Maintain Relationships screen, where you can create a new relationship for the selected entity without an address
9. **Buttons**:
    a. Click the **Submit** button with an address selected to navigate to the Maintain Relationships screen where you can create a new relationship for the selected entity. Click the Submit button with a current relationship selected to edit the selected relationship.
    b. Click the **Cancel** button to cancel the current action.

Entity Search

Entity >> Entity Search

The **Entity Search** screen is used to locate a particular entity in SIS. The user can navigate to this screen directly by clicking on the Entity module tab. In addition, this screen is displayed in a separate Internet Explorer window when the user clicks on a Search for Entity link from within another screen.

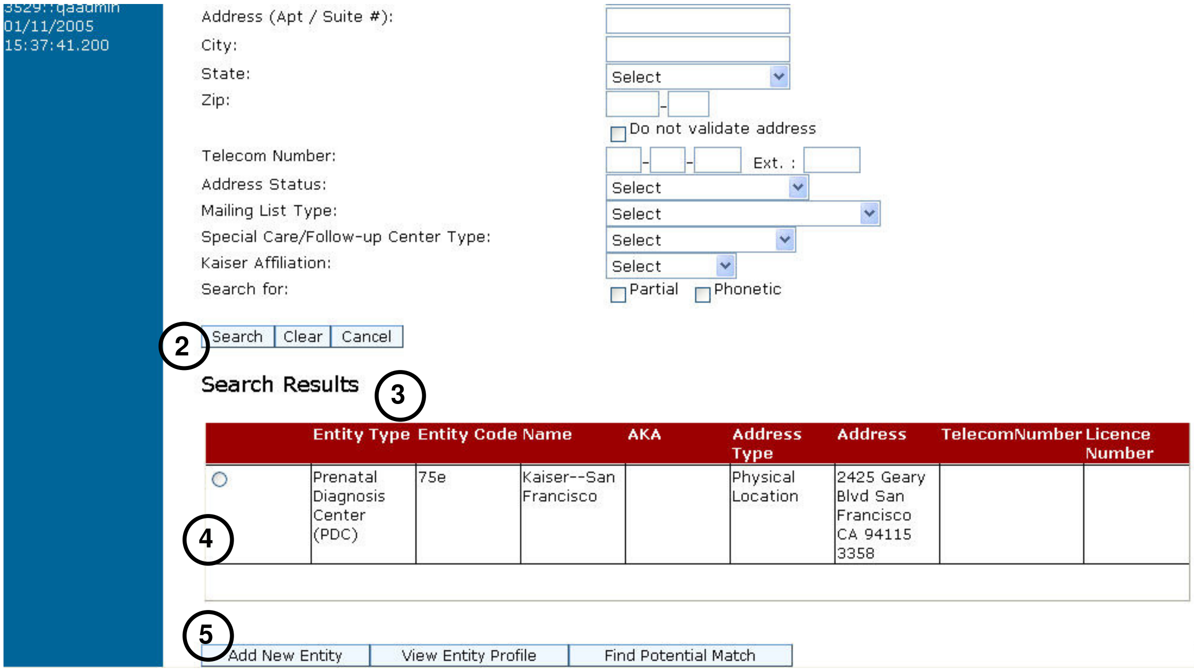
FIGURE 1



1. Enter any information you know about the entity in the **Search For** fields. You must enter at least two search criteria.

Entity Search (continued)

FIGURE 2



2. **Buttons:**
    a. Click the **Search** button to perform a search based on the criteria you entered.
    b. Click the **Clear** button to clear the Search For fields.
    c. Click the **Cancel** button to cancel a search in progress.
3. **Search Results** grid displays all entity records matching the search criteria.
4. Click the radio button next to an entity record to select it.
5. **Buttons:**
    a. Click the **Add New Entity** button to create a new entity record.

        Note: You must perform an entity search before you can enter a new entity record.
    b. Click the **View Entity Profile** button to display the Entity Profile screen for the selected entity.
    c. Click the **Find Potential Match** button to display the Merge Entities screen for the selected entity.

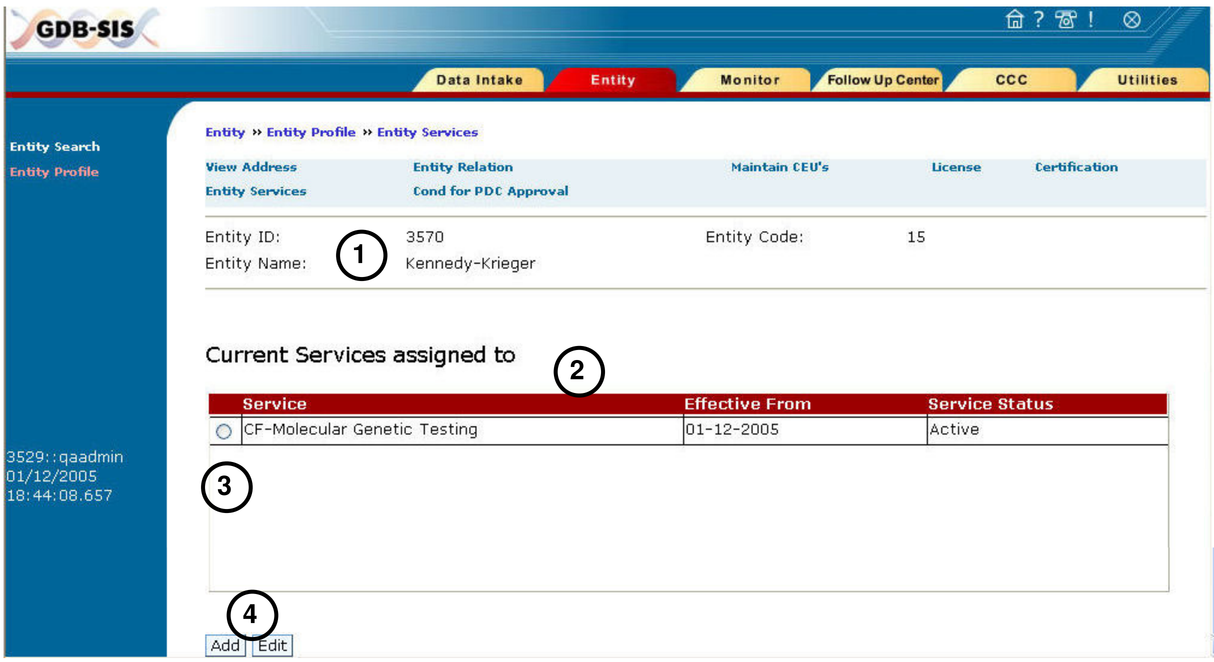
Entity Services

Entity >> Entity Profile >> Entity Services

The **Entity Services** screen is used to view, create and update services for an entity. Services are tracked for entities that are “Other Laboratories”; however SIS will allow you to enter service information for any entity type. The types of Services that can be added for Other Laboratories are:

- CF - Molecular Genetic Testing
- CF - Sweat Testing
- CF - IRT Testing
- MS/MS Testing

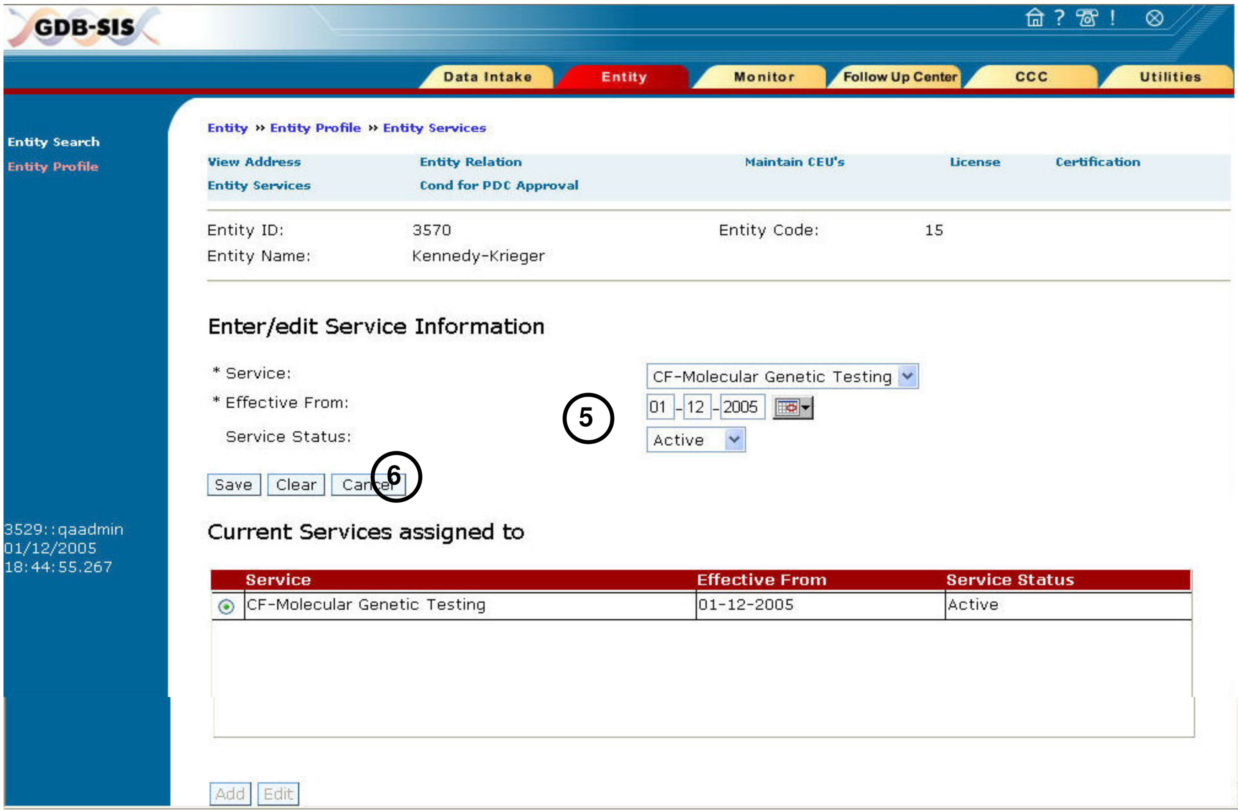
FIGURE 1



1. Information about the entity is displayed in a read-only format. To update this information you must use the Entity Profile screen.
2. Existing services assigned to the entity are displayed in the **Current Services assigned to** grid.
3. Click the radio button next to the service to select it for editing.
4. **Buttons:**
   a. Click the **Add** button to add a new service for the selected entity.
   b. Click the **Edit** button to make changes to the selected service.
   c. As part of **PEII** change, NT Practitioner data is editable only if the login user has "**Allow NT**" special permission. If the special permission is not provided for the user, **Add** and **Edit** buttons are disabled on the screen for NT Practitioner data.

Entity Services (continued)

FIGURE 2



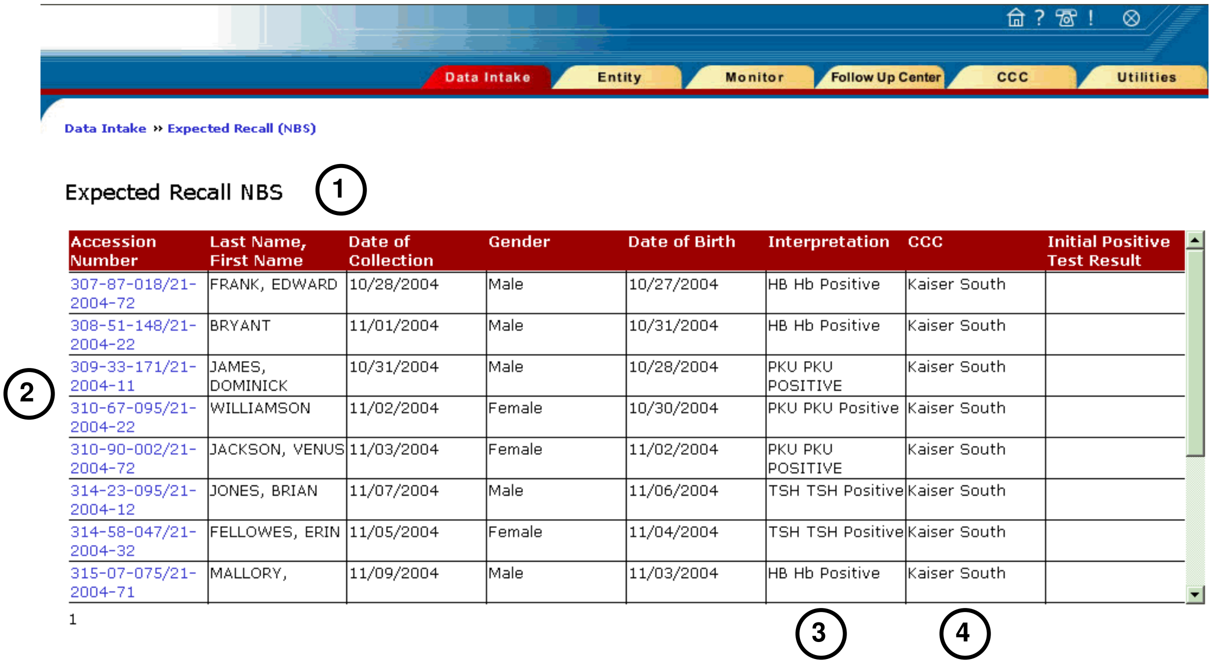
5. Enter service information for the entity. **Service** and **Effective From** are required fields.
6. **Buttons:**
   a. Click the **Save** button to save the new service record with the information you entered in the fields above.
   b. Click the **Clear** button to clear the information you have entered discarding any changes you made.
   c. Click the **Cancel** button to return to the previous screen discarding any changes you made.

   Note: If you click the Add button instead of the Edit button the fields will be empty. After clicking Save a row will be added to the Current Services assigned to grid.

Expected Recall (NBS)

Data Intake >> Expected Recall (NBS)

The **Expected Recall NBS** screen displays a list of all newborn screening accession numbers that are expecting a recall statewide. This screen will be used at the Genetic Disease Laboratory only. For each accession number, one row will be displayed per disease for which a recall is expected. Early and missing cases will also be displayed as a separate row. You can click on the accession number link of a disease to enter the recall test results.



Accession Number	Last Name, First Name	Date of Collection	Gender	Date of Birth	Interpretation	CCC	Initial Positive Test Result
307-87-018/21-2004-72	FRANK, EDWARD	10/28/2004	Male	10/27/2004	HB Hb Positive	Kaiser South	
308-51-148/21-2004-22	BRYANT	11/01/2004	Male	10/31/2004	HB Hb Positive	Kaiser South	
309-33-171/21-2004-11	JAMES, DOMINICK	10/31/2004	Male	10/28/2004	PKU PKU POSITIVE	Kaiser South	
310-67-095/21-2004-22	WILLIAMSON	11/02/2004	Female	10/30/2004	PKU PKU Positive	Kaiser South	
310-90-002/21-2004-72	JACKSON, VENUS	11/03/2004	Female	11/02/2004	PKU PKU POSITIVE	Kaiser South	
314-23-095/21-2004-12	JONES, BRIAN	11/07/2004	Male	11/06/2004	TSH TSH Positive	Kaiser South	
314-58-047/21-2004-32	FELLOWES, ERIN	11/05/2004	Female	11/04/2004	TSH TSH Positive	Kaiser South	
315-07-075/21-2004-71	MALLORY,	11/09/2004	Male	11/03/2004	HB Hb Positive	Kaiser South	

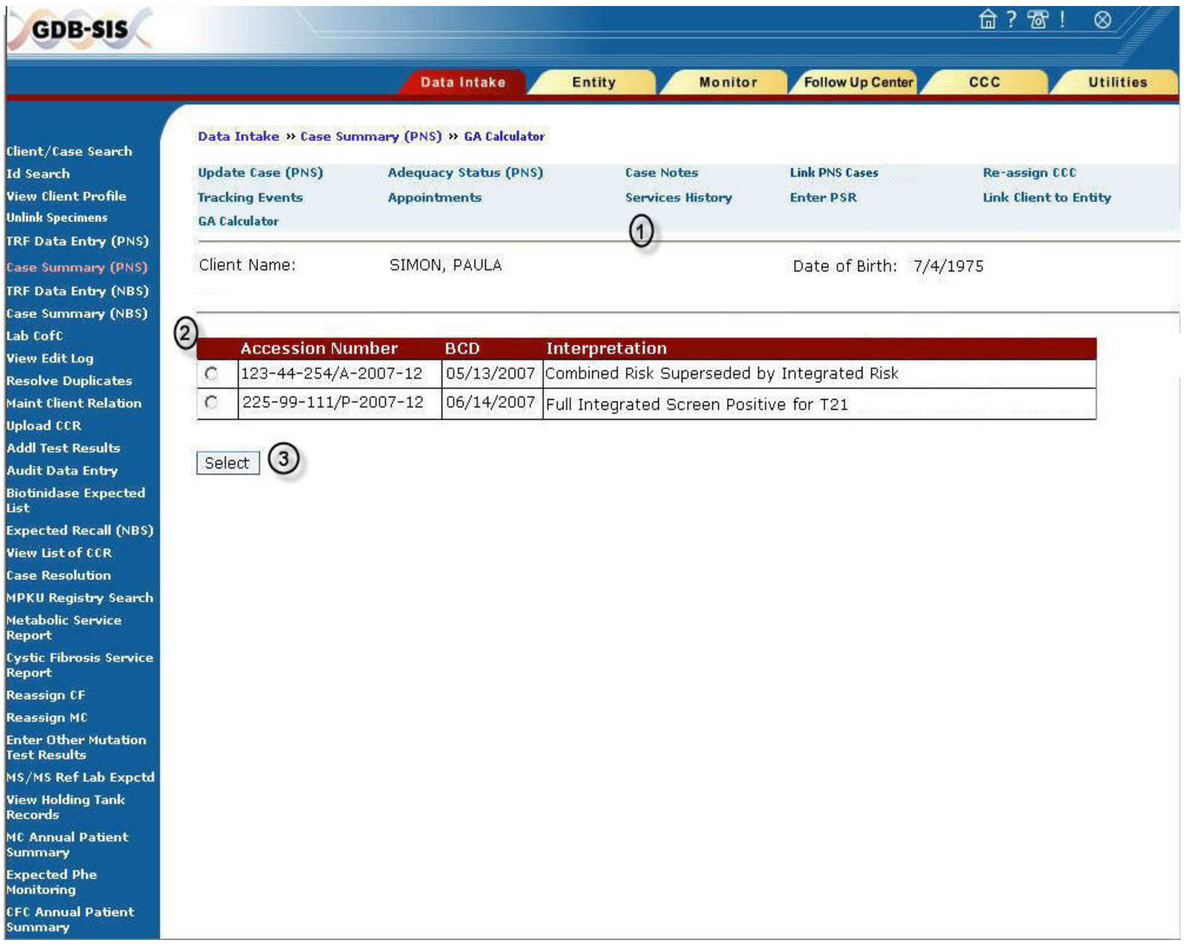
1. The **Expected Recall NBS** grid displays a list of all accessions numbers that are expecting a recall statewide.
2. Click an **Accession Number** link to navigate to the Additional Test Results screen, where you can enter additional test results.
3. The **Interpretation** column displays the interpretation for the case.
4. The **CCC** field shows the Case Coordination Center to which the case is assigned.

GA Calculator

Data Intake>>Case Summary (PNS) >> GA Calculator

This screen allows you to calculate GA and days difference for a specimen based on current GA details and the information entered by the user. This screen serves as a calculator and does not save any data.

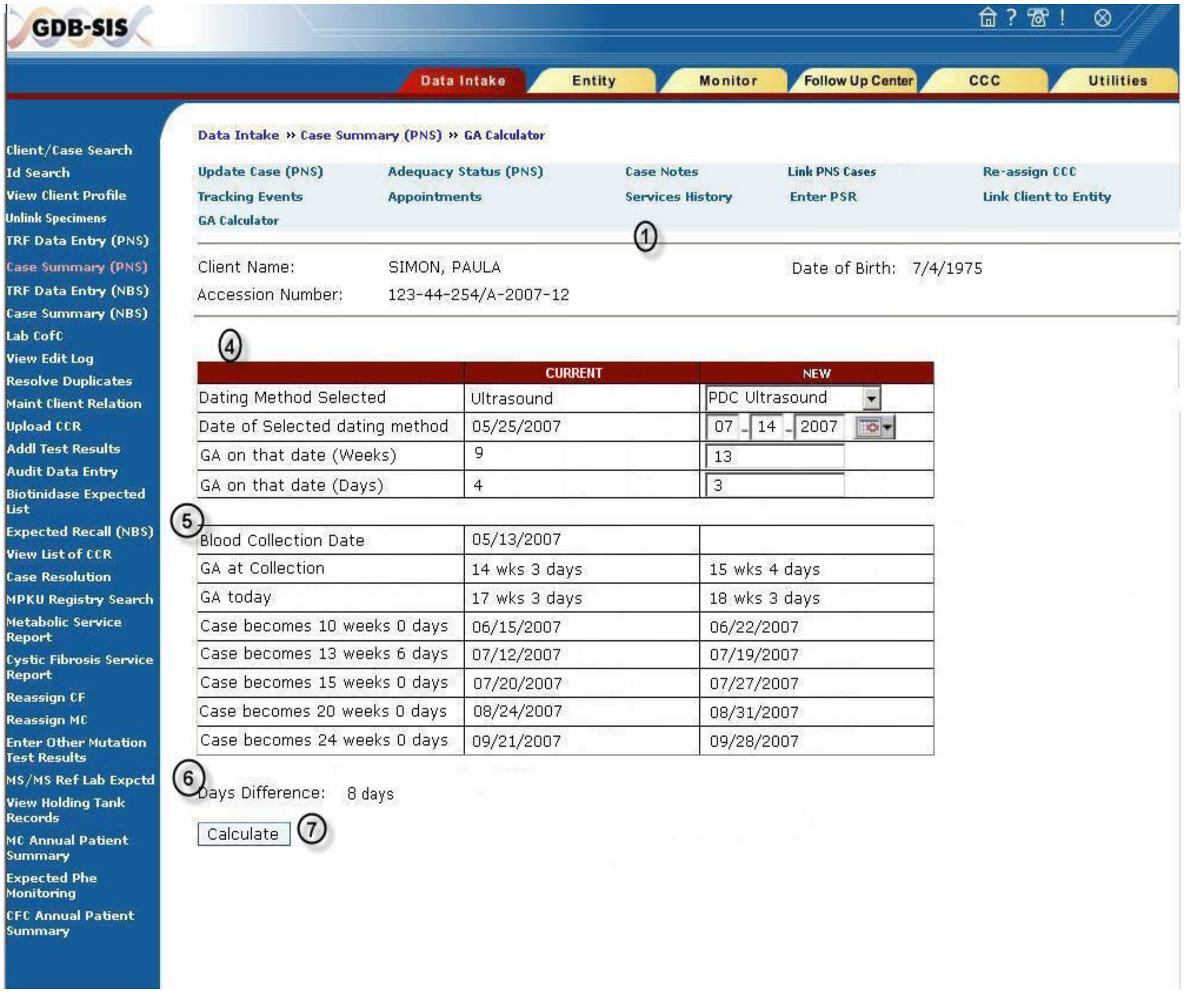
FIGURE 1



1. Client information displays in read only mode .If there is only 1 valid specimen in the case, then Accession Number displays in the header section. If there are more than 1 valid specimen in the case, then displayed after user selects one of them.
2. Displays a list of all valid specimens in the case including ‘Too Early High AFP’ and ‘Too Late High AFP’ if there are no other valid 2nd Trimester specimens.
3. Select button allows you to view the GA details of the selected accession number

GA Calculator (Continued)

FIGURE 2



4. Displays current dating method information for the selected Accession number and editable fields for the user to enter the data
5. Displays current and new GA information in separate columns.
6. Difference between New GA Today and Current GA Today.
7. Calculate button allows to you to view the GA changes based on the information entered by the user.

Generate Audit Cases

Monitor >> Schedule Site Visits >> Generate Audit Cases

The **Generate Audit Cases** screen is used to select cases for review during a follow-up center site visit. Once a site visit has been scheduled (from the Schedule Site Visits screen) and the cases to be reviewed have been selected, you can print the case documentation for the site visit. An Alert will be generated for the follow-up center notifying them 30 days prior to the site visit.

The case characteristic selection criteria to generate the audit cases for Metabolic Centers are as follows:

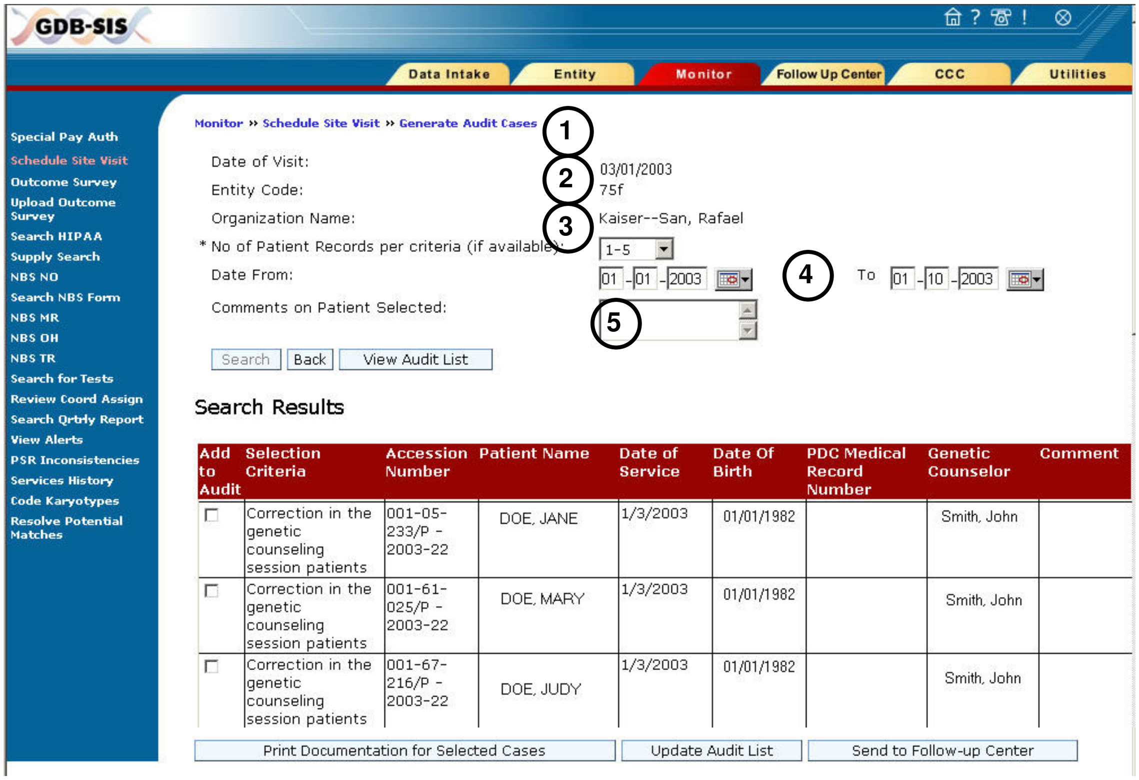
- PKU and PKU Variant Diagnosed Cases
- Galactosemia and galactosemia variant Diagnosed Cases
- MS/MS Diagnosed Cases

The case characteristic selection criteria to generate the audit cases for Prenatal Diagnosis Centers (PDCs) are as follows:

- NTD History patients
- Rx History patients
- Down syndrome patients
- Down syndrome patients with amniocentesis declined
- Down syndrome Too Early patients
- Down syndrome Too Late patients
- Down syndrome corrected to negative by ultrasound
- Correction in the genetic counseling session patients
- NTD patients with amniocentesis provided
- NTD patients with amniocentesis declined
- NTD too late patients
- NTD patients corrected to negative
- Trisomy 18 patients with amniocentesis provided
- Trisomy 18 patients with amniocentesis declined
- Patients with significant Ultrasound abnormalities (i.e.—NTDs)
- Patients with any chromosomal abnormality
- Elevated AF-AFP patients

Generate Audit Cases (continued)

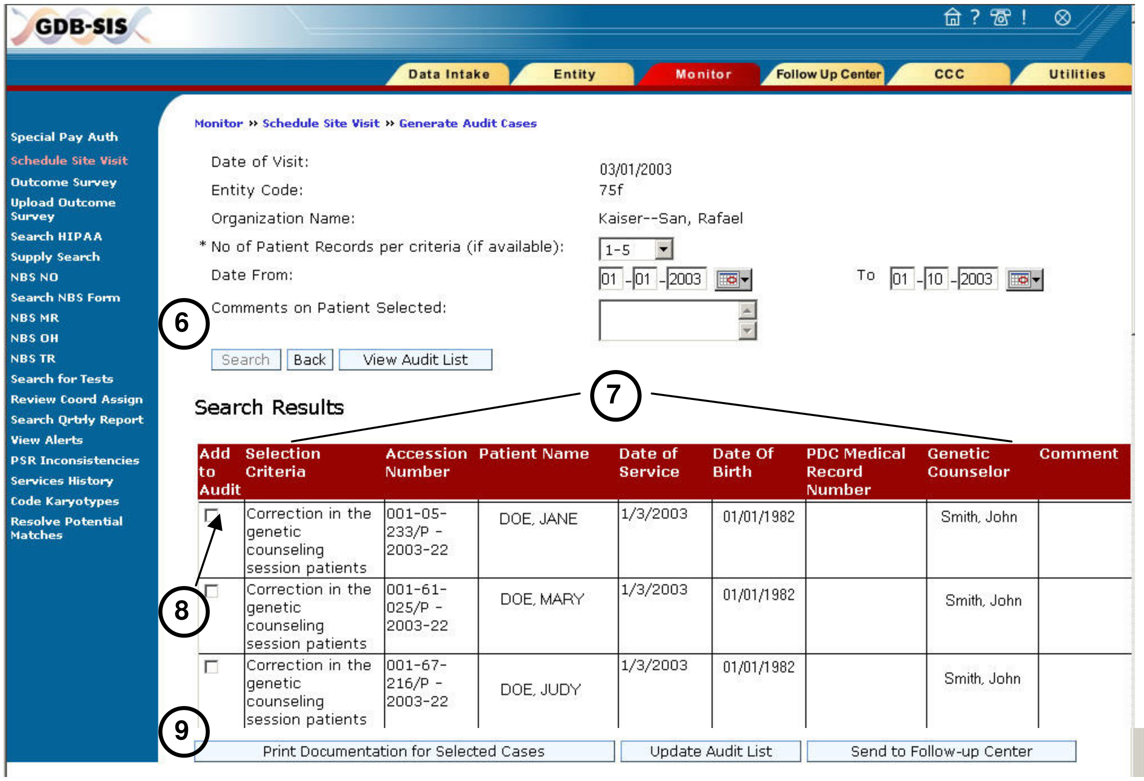
FIGURE 1



1. Navigation and screen name.
2. Information about the site visit, including the **Date of Visit**, **Entity Code (A.K.A. PDC Code; Follow-up Center Code)** and **Organization Name** is displayed in a read-only format based on the site specified in the Schedule Site Visits screen.
3. Select the **No of Patient Records per criteria (if available)** to specify how many patient records matching a given criteria (see list on previous page) within the date range specified will be returned in the **Search Results** grid. The purpose of this field is to increase or decrease the number of records that are returned for any one criteria, allowing you to select a representative cross-section of cases for the site visit. This is a required field denoted by the (*).
4. Select the date range for the case search by selecting the **Date From** and **To**.
5. Enter any comments you have for the selected case in the **Comments on Patient Selected** field. After you select cases for the audit list, the comments you enter here will be displayed in the **Comments** column of the **Search Results** grid for each of the selected cases.

Generate Audit Cases (continued)

FIGURE 2



6. **Buttons:**
   a. Click the **Search** button to search for patient records with the specified search criteria.
   b. Click the **Back** button to return to the Schedule Site Visit screen.
   c. Click the **View Audit List** button to view all cases that have been previously selected for the site visit identified.
7. All patient records matching the search criteria will be displayed in the **Search Results** grid.
8. Click the **Add to Audit** checkbox next to a patient case record to select it for inclusion in the Audit List.
9. **Buttons:**
   a. Click the **Update Audit List** to add the selected cases to the set of cases to be audited during the site visit. All unselected cases will be removed from the Search Results grid.
   b. Click the **Print Documentation for Selected Cases** button to print all of the case-specific documentation for the cases that were selected for auditing.

Generate Audit Cases (continued)

c. Click the **Send to Follow-Up Center** button to send an alert to the follow-up center notifying them that a site visit has been scheduled and they may view a list of the cases that will be examined for this audit.

   Note: The aforementioned alert only applies to PDC's, not Metabolic Centers or SCCC's.

Headline Cases (NBS)

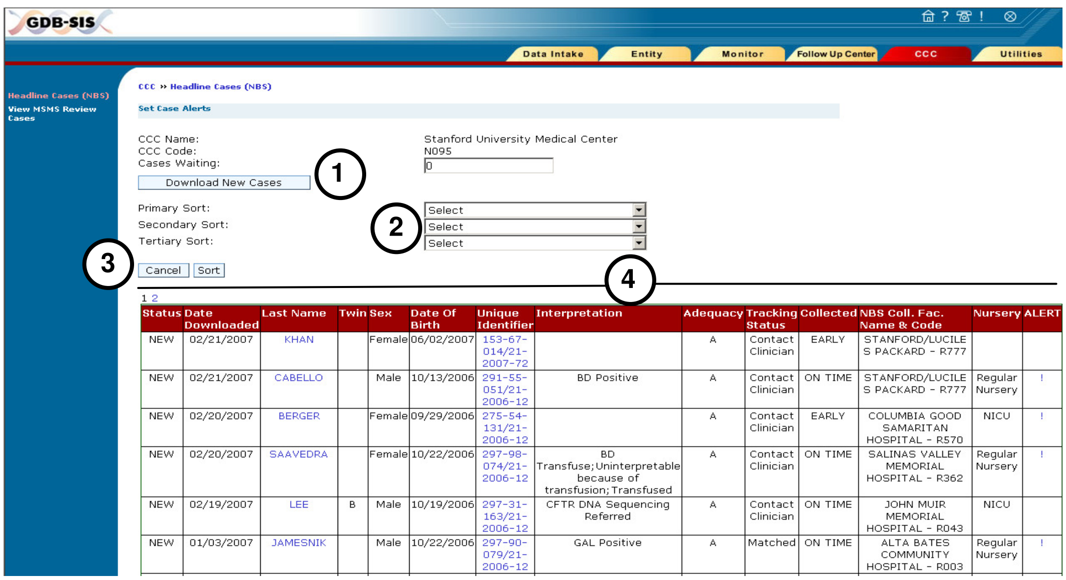
CCC >> Headline Cases (NBS)

The **Headline Cases (NBS)** screen is used by NBS Case Coordinators to view all active cases assigned to their Case Coordination Center (CCC). This screen is displayed to CCCs by default on login. This includes positives, inadequates, earlies, transfused, missing results (MRs), Out of Hospital births (OHs), Not Obtained Specimens (NOs) among others. You can view and sort the cases, and access case or client information by clicking on one of the hyperlinks in the Headline Case grid.

This is the only screen from which you can access the Set Case Alerts screen to manually add an alert to a case.

You can bypass this screen by clicking on any of the module tabs.

FIGURE 1



1. The number of headline cases that are assigned to the CCC but not yet downloaded by the CCC are shown in the cases waiting box. Click on the **Download New Cases button** to populate grid below.
2. Headline cases records can be sorted by clicking links in headline case data grid header area, or by selecting sorting criteria from dropdown boxes and clicking **Sort** button. For sorting, choose Primary, Secondary and Tertiary sorts by selecting fields from the dropdown boxes.
3. **Cancel:** Cancels operation.
4. Headline cases grid hyperlinks:
   a. **Status:** Clicking on any of the hyperlinks does not change the "New" status to "Open" for the case. "New" status will be changed to "Open" only after user enters any Tracking Event for this case.
   b. **Last Name:** If this hyperlink is clicked the View Client Profile screen is shown to the user.

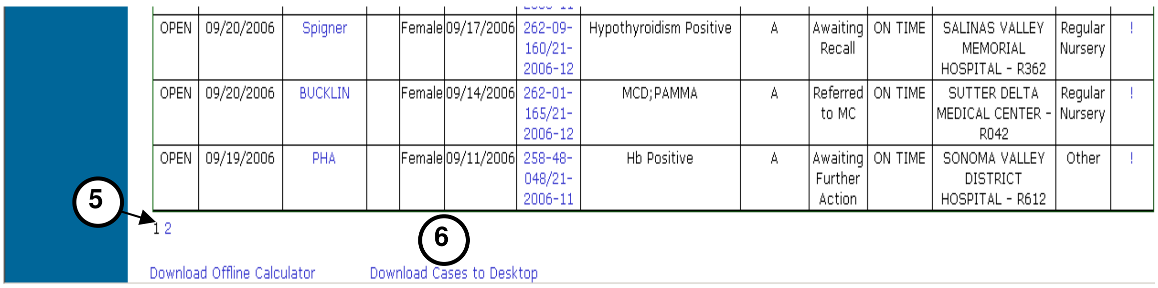
Headline Cases (NBS) (continued)

c. **Unique Identifier:** If the Unique Identifier hyperlink is clicked, the NBS Case Summary screen is shown to the user.

d. **Alert:** The Alert icon (!) is displayed for each case row if there are any alerts for that case which can be viewed by the case coordinator. If the alert has been viewed the (!) will turn to "V!" for alert viewed. When clicking the alert icon, the "Get Case Alerts Page" is displayed.

The NBS Cases screen is typically a long screen. This screenshot captures the bottom of the page to show additional functionality.

FIGURE 2



OPEN	09/20/2006	Spigner		Female	09/17/2006	262-09-160/21-2006-12	Hypothyroidism Positive	A	Awaiting Recall	ON TIME	SALINAS VALLEY MEMORIAL HOSPITAL - R362	Regular Nursery	!
OPEN	09/20/2006	BUCKLIN		Female	09/14/2006	262-01-165/21-2006-12	MCD;PAMMA	A	Referred to MC	ON TIME	SUTTER DELTA MEDICAL CENTER - R042	Regular Nursery	!
OPEN	09/19/2006	PHA		Female	09/11/2006	258-48-048/21-2006-11	Hb Positive	A	Awaiting Further Action	ON TIME	SONOMA VALLEY DISTRICT HOSPITAL - R612	Other	!

5. There are 50 cases per page in this report. For additional pages, click on next page number shown below the grid.
6. Click on **Download Cases to Desktop** to generate an Excel spreadsheet of all headline cases.

Headline Cases (PNS)

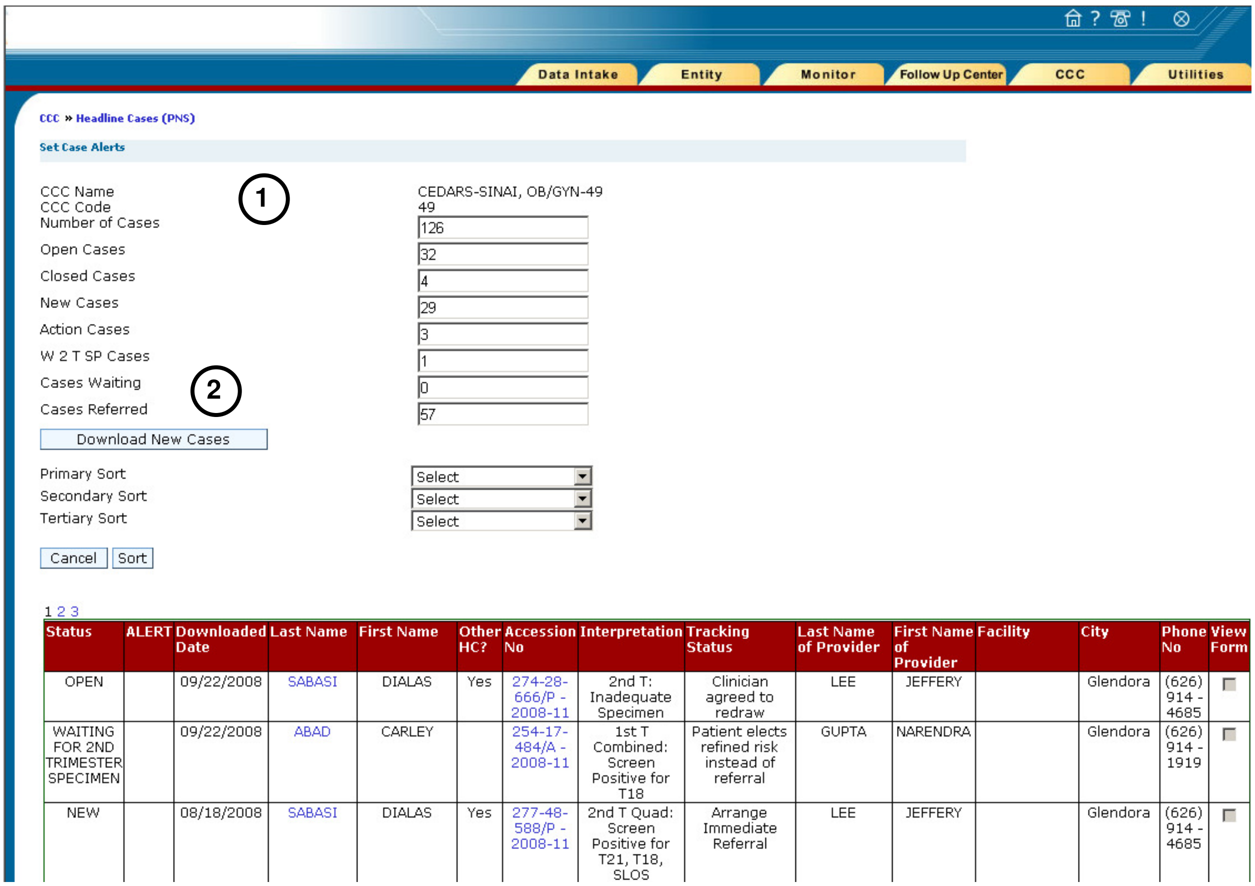
CCC >> Headline Cases (PNS)

The **Headline Cases (PNS)** screen is used by Prenatal Case Coordinators to view all active cases assigned to their Case Coordination Center (CCC). You can view and sort the cases, and access the case or client information by clicking on one of the hyperlinks in the Headline Case grid.

The user can access the Set Case Alerts screen to manually add an alert to a case.

You can bypass this screen by clicking on any of the Module Tabs.

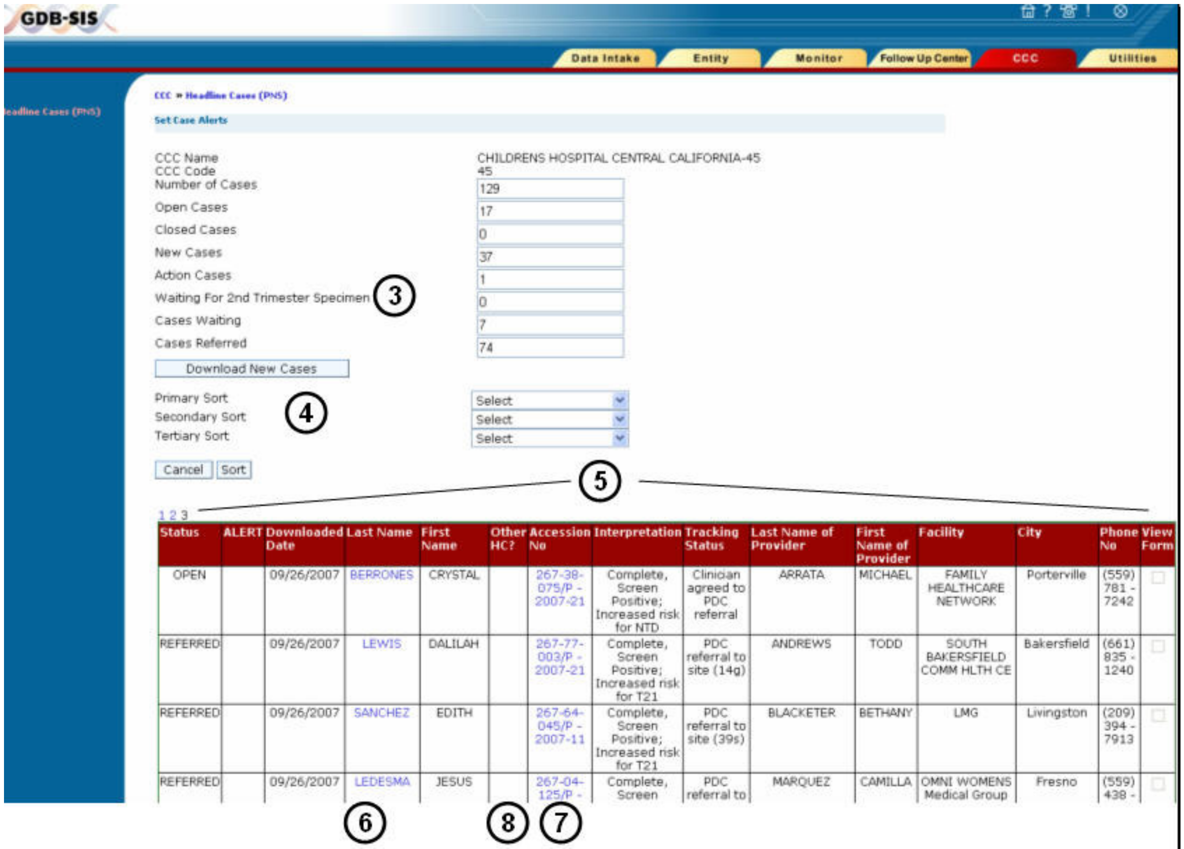
FIGURE 1



1. **CCC Name** and **CCC Code** fields identify your facility information, based on your log in information.
2. **Cases Waiting** displays the number of new cases that have not yet been downloaded into the Headline Case grid. The **Download New Cases** button loads all waiting cases into the Headline Case grid.

Headline Cases (PNS) (continued)

FIGURE 2



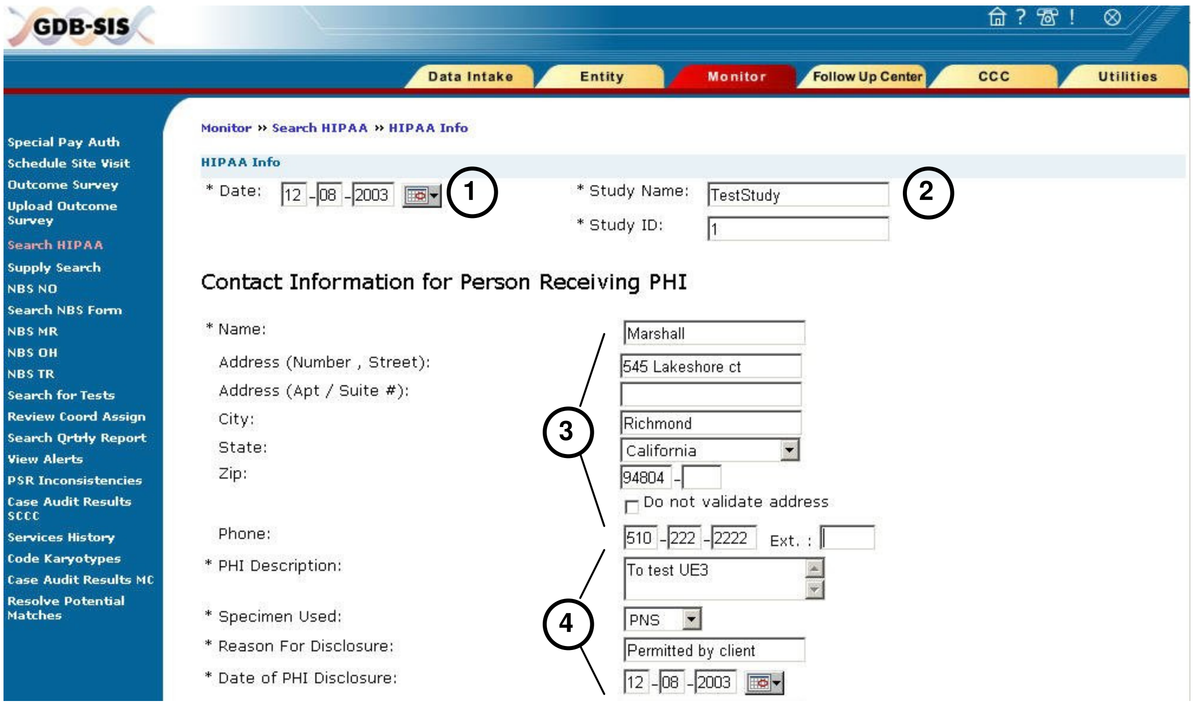
3. **W 2 T SP** displays the number of cases **awaiting for refined risk** that have not yet been downloaded into the Headline Case grid**.**
4. Use the sort dropdowns to sort the cases in the grid. If you select a **Primary**, **Secondary**, and **Tertiary** sort simultaneously, the cases in the Headline Case grid will be sorted in order by the Primary criteria, then Secondary, then Tertiary,
5. Clicking on any of these header titles will re-sort the data in the grid by that column.
6. Clicking on a **Last Name** link will display the View Client Profile screen for that client.
7. Clicking on an **Accession Number** link will display the pre PEII Case Summary (PNS) screen for a pre PE II case. It will display the post PEII Case Summary (PNS) if the case is a post PEII case.
8. **"Other HC?'** will be marked yes if there is another sample in the case that is in the Headline Case screen. This column will appear blank for Pre Go-Live cases.

HIPAA Information

Monitor >> Search HIPAA >> HIPAA Info

This screen allows you to create a new sample study, edit an existing sample study, and upload the associated data (accession or client numbers) file into SIS.

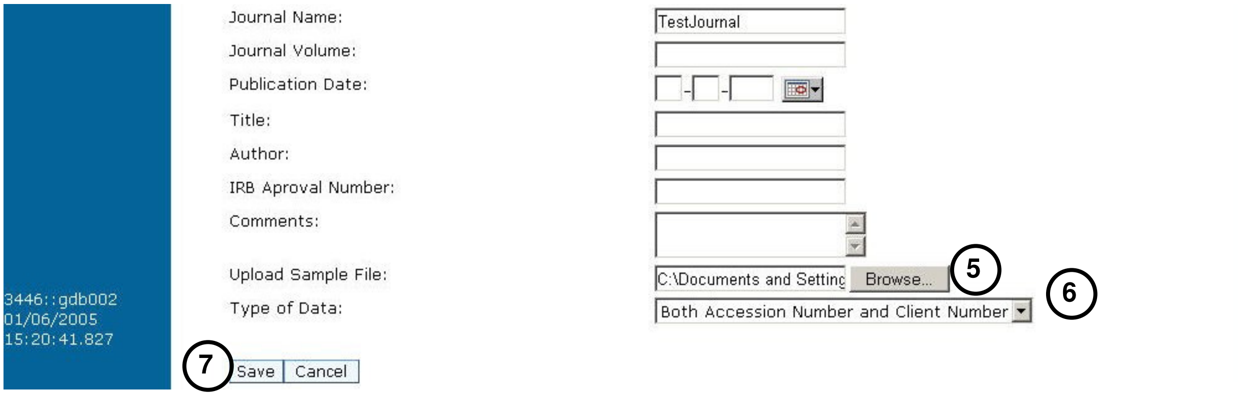
FIGURE 1



1. **Date** the sample study is created in SIS is a required field.
2. **Study Name** and **Study ID** are required fields. The Study Name and Study ID, in most cases, would exist in an alternate database being used by the GDB. These are used to link the study entered into SIS with an independent, 3rd party specimen tracking database.
3. **Contact Information for Person Receiving PHI:**
   a. Address Information: SIS will automatically attempt to validate addresses entered. If possible, SIS will update the address information to a recognized address. For example, if you've entered 1234 Oak Dr., and the address validation program recognizes only a 1234 Oak St., it will automatically update the address information. If you elect to use the address validation feature, you should verify any corrections SIS makes to the address you have entered.
   b. **Do not validate address** – Checking the box will deactivate the address validation feature.
4. **Name**, **PHI Description**, **Specimen Used**, **Reason for Disclosure**, and **Date of Disclosure** are required fields.

HIPAA Information (continued)

FIGURE 2



5. When you click the **Browse** button to Upload a Sample File, a "Choose File" popup window will be displayed, allowing you to find and select the file you want to upload (*.txt files only), and will insert the filepath into the field.
6. The **Type of Data** is a required field. You must indicate whether the upload file contains Accession Numbers, Client Numbers, or Both.
7. **Buttons:**
   a. **Save** button adds a new study into SIS when creating a new sample study. When editing an existing study, saves the data and any changes into SIS.

      ➢ To find an existing study to edit, use the Search HIPAA screen.

   b. **Cancel** button cancels any unsaved changes, and directs you to the Search HIPAA screen.

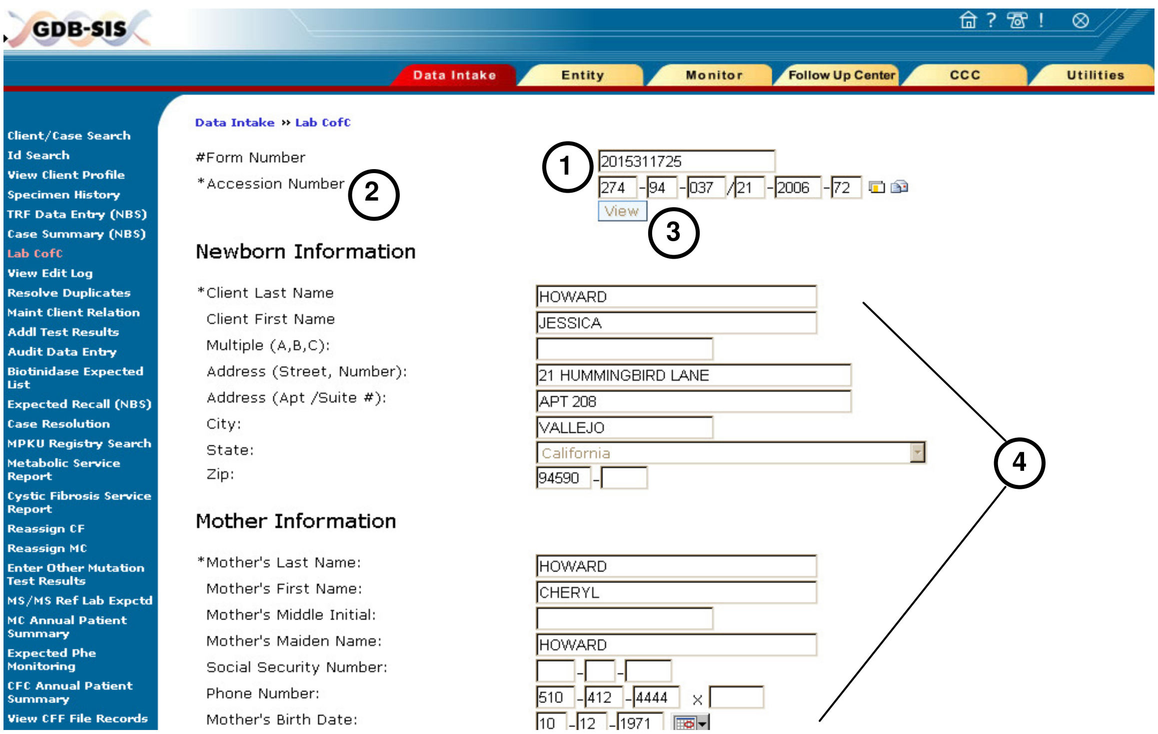
Lab C of C (Confirmation of Contact)

Data Intake >> Lab CofC

Laboratories are required to report screen positive results for PKU, galactosemia, hypothyroidism, CAH, BD, MS/MS disorders or inadequate specimens directly to the CCC. Laboratories are required to document this contact in SIS. This documentation is referred to as a Laboratory Confirmation of Contact (Lab CofC).

Required fields are indicated by the preceding asterisk (*). For key fields, SIS will require you to enter the same information twice. These double-entry fields are indicated with a preceding pound sign (#). While these fields are not required to save a TRF in SIS, if you enter data in these fields, you will be required to enter the information twice and then save to permanently save the data.

FIGURE 1



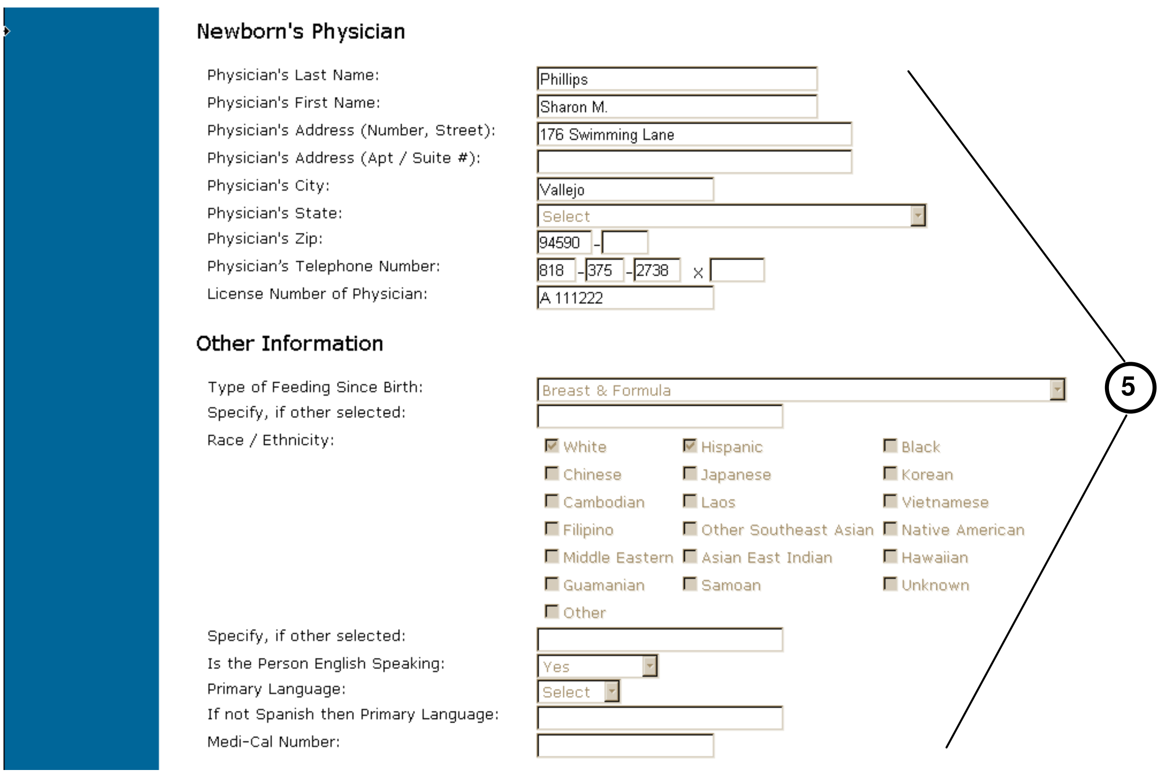
1. **Form Number** will be pre-filled once you have clicked the **View** button.
2. Enter the **Accession Number**. This is a required field.
3. Click **View** button to populate the Lab C of C fields as follows:
   a. If there is an active case in SIS for the Accession Number, the most current case information will be used to pre-fill TRF data in the Lab C of C fields. You will not be allowed to change this existing case information.
   b. If there is one or more previous Lab C of Cs for the case, they will be displayed in a grid. You may select a previous Lab C of C in order to populate the new Lab C of C fields with existing data.

Lab Confirmation of Contact (continued)

c. Note: If a case is not yet active (i.e. it is prior to 8:00 p.m. on the date of TRF data entry) you must use the TRF to enter the same data in the Lab C of C fields. You must use caution, as any changes made will override TRF data when the information is transferred to SIS after 8:00 p.m.

4. **Newborn Information/Mother Information** (TRF Data): Fill in using blank and dropdown boxes.

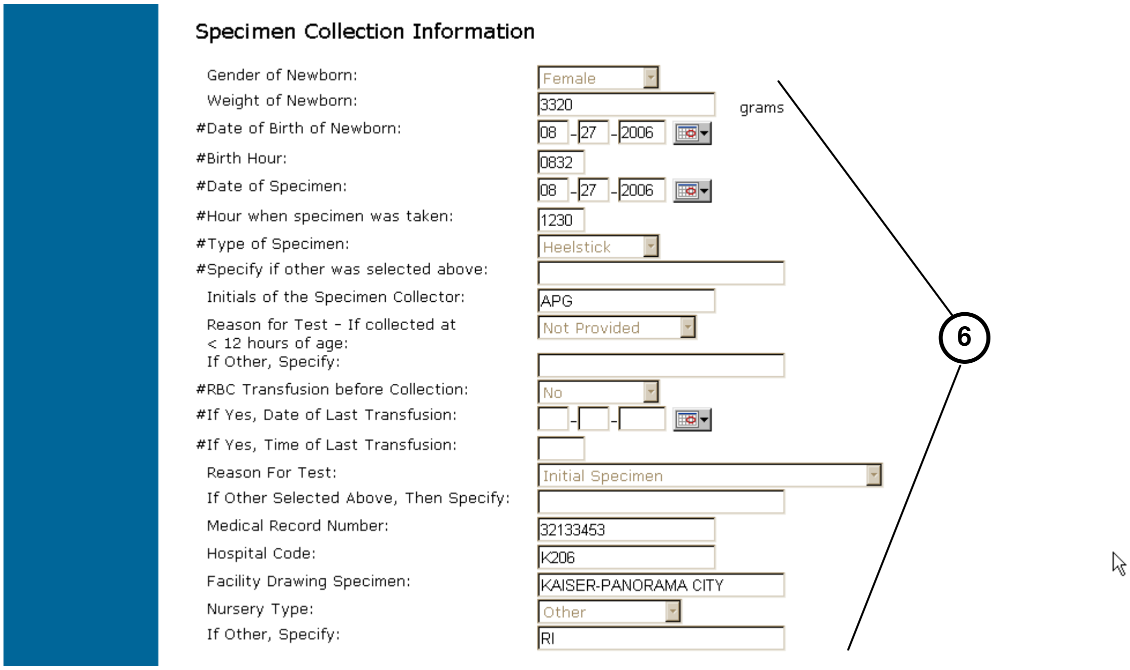
FIGURE 2



5. TRF Data: Any updates you make on this screen will take precedence over the TRF data that will be transferred to SIS at 8:00 p.m. on the same day the Lab C of C is entered.

Lab Confirmation of Contact (continued)

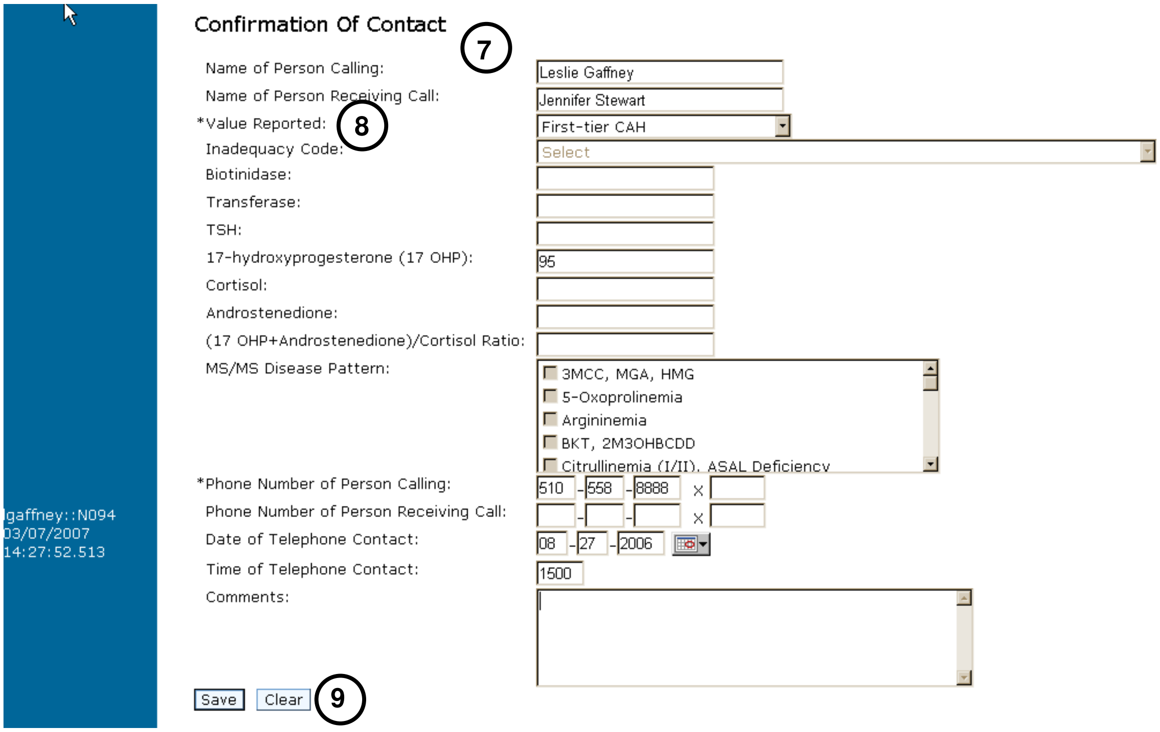
FIGURE 3



6. TRF Data: Any updates you make on this screen will take precedence over the TRF data that will be transferred to SIS at 8:00 p.m. on the same day the Lab C of C is entered.

Lab Confirmation of Contact (continued)

FIGURE 4



7. **Confirmation of Contact**: The name of the person calling will be populated with the name of the person logged into SIS. However, you may change this information. Enter the name of the person receiving the call.

8. **Value Reported** is a required field. Make a selection from the dropdown box.

   Note: Enter the values reported for the identified test results or select the appropriate MS/MS disease pattern.

   Enter the remaining test information if available.

9. **Buttons:**

   a. **Save:** Saves the information to the Headline case screen as positive or inadequate.

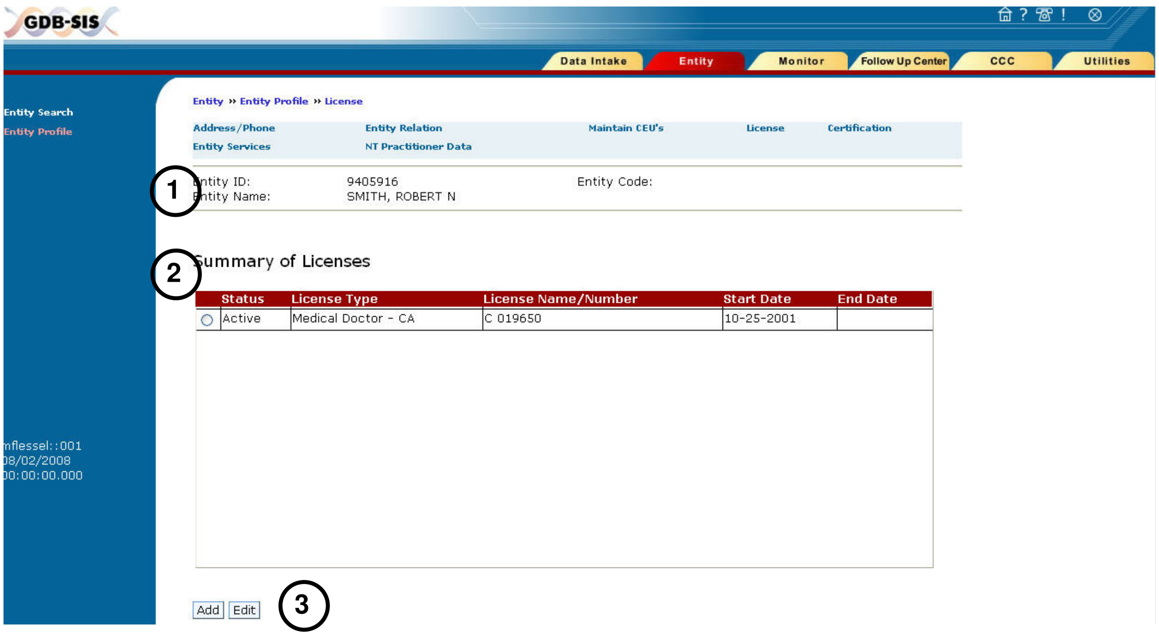
   b. **Clear:** Clears all data from the form. If you have used the **View** button to populate the fields with data from a TRF that is already in SIS, fields with a read-only format will not be cleared.

License

Entity >> Entity Profile >> License

The **License** screen is used to view, create and update license information for an entity. Typically, license information will be tracked for “person-type” entities such as physicians or nurses; however SIS will allow you to enter license information for any entity type. See Appendix F for a list of required formats for various entity types.

FIGURE 1

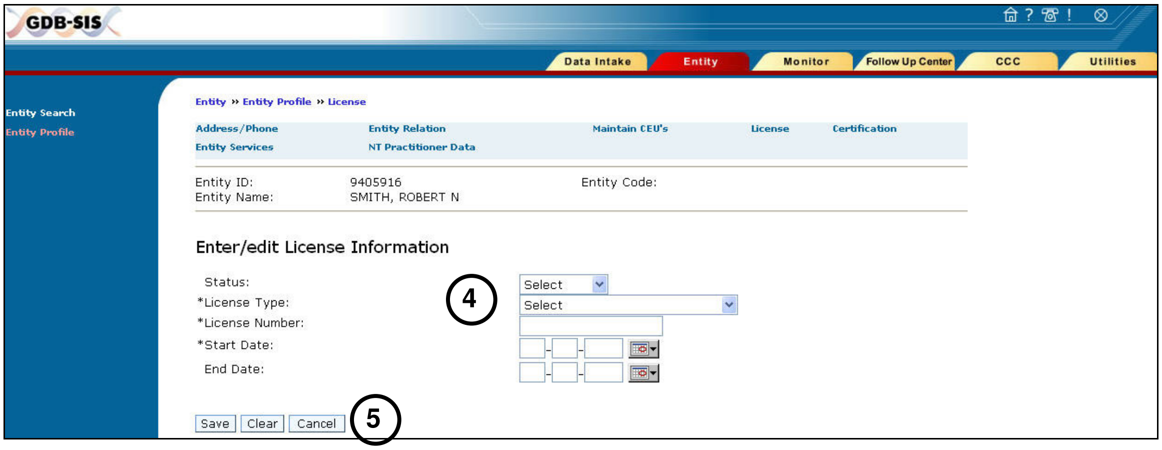


1. Displays information about the entity that is currently selected in a read-only format. To update this information you must use the **Entity Profile** screen.
2. **Summary of Licenses** grid displays existing license information for the selected entity. Click the radio button next to the license record to select it for editing.
3. **Buttons:**
   a. Click the **Add** button to add a new license record for the selected entity (see **FIGURE 2**).
   b. Click the **Edit** button to make changes to the selected license record (see **FIGURE 3**).

As part of **PEII** change, NT Practitioner data is editable only if the login user has "**Allow NT**" special permission. If the special permission is not provided for the user, **Add** and **Edit** buttons are disabled on the screen for NT Practitioner data.

License (continued)

FIGURE 2



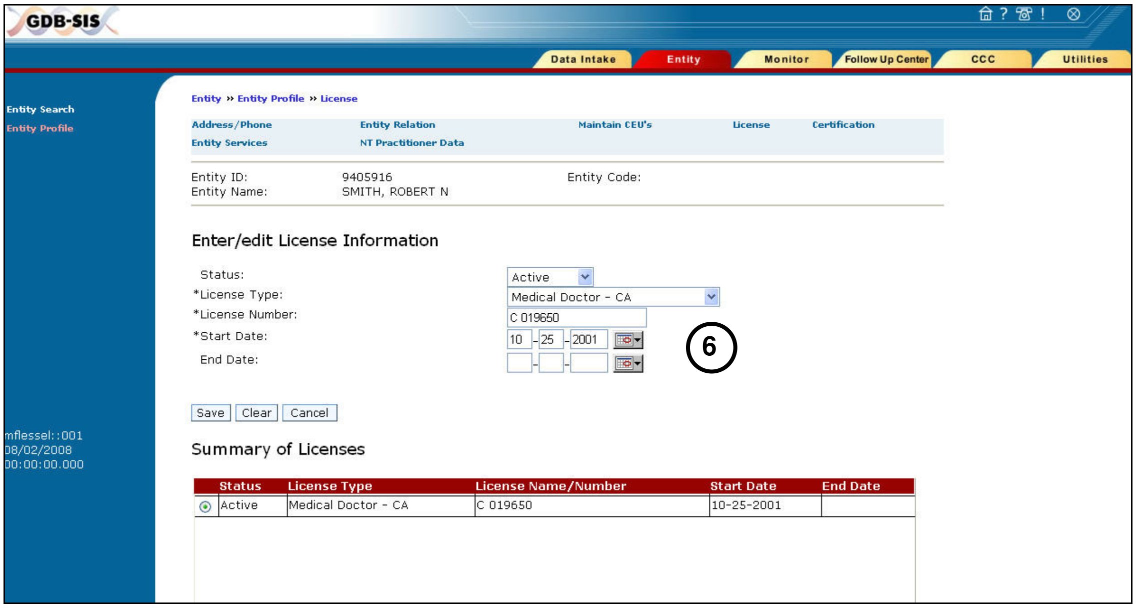
4. If you click the Add button (see 3), the License Information fields will be blank. **License Type**, **License Number** and **Start Date** are required fields.
   a. If available, enter the license expiration date in the **End Date** field. If no value is entered SIS will automatically populate "12/31/9999".
   b. The format for the **License Number** depends on the License Type that is selected. For example:
      - Medical Doctor – California

        X ######
      - Registered Nurse

        RN######
5. **Buttons:**
   a. Click the **Save** button to save the new license record. A new row will be added to the Summary of Licenses grid (see 2).
   b. Click the **Clear** button to clear the information you have entered discarding any unsaved changes.
   c. Click the **Cancel** button to discard any unsaved information and return to the previous screen.

License (continued)

FIGURE 3



6. If you click the Edit button (see 4), the License Information fields will display the existing license information. You can save changes to the existing information from this screen. See 5 for specific information about the License Information fields.

Appendix F - List Of License Type Formats:

License Type	Format
Medical Doctor – CA	A ######, B ######, C ######., etc
Medical Doctor - Nevada	NV #####
Registered Nurse	RN######
Nurse Practitioner	NP #####, NPF#####
Certified Nurse Midwives	CNM ###(#)
Licensed Midwives	LM ####
Licensed Vocational Nurse	VN #####
Physician's Assistant	PA #####
Medical Military Personnel	Allow any format
Doctor of Osteopathy	20A ####
Accreditation Ultrasound (ACR)	Allow any format
Accreditation Ultrasound (AIUM)	Allow any format
California Lab Field Services	Allow any format
CLIA	Allow any format
Genetic Counselor	Allow any format
PhD Medical Geneticist	Allow any format
Unknown	Allow any format
Nurse Midwives	NMW ###(#)

Link Accession Numbers

Data Intake >> Case Summary (PNS) >> Link Accn Numbers

OR

Data Intake >> Case Summary (NBS) >> Link Accn Numbers

The **Link Accn Numbers** screen allows you to link two accession numbers. The most common uses of this screen include recalls and redraws. This screen provides the basic information for the two accession numbers side-by-side, in order to help you determine whether they should be linked.

Before allowing a link of the two accession numbers, SIS will automatically validate that the two numbers do not belong to different clients. Linked Accession Numbers must always have the same client. If SIS determines that they belong to different clients, the system will not allow them to be linked, and will display an error message. Additional conditions when SIS will not allow the accession numbers to be linked:

1. If the accession numbers are same
2. The accession numbers are already linked.
3. If the accession numbers have different program types.
4. If the program type is NBS and the difference between the accession dates is more than 32 weeks between the cases.

When you initially load this screen, the accession number you were viewing on the Case Summary (NBS or PNS) screen is the Primary; the one you will specify in the Accession Number field will be the Secondary.

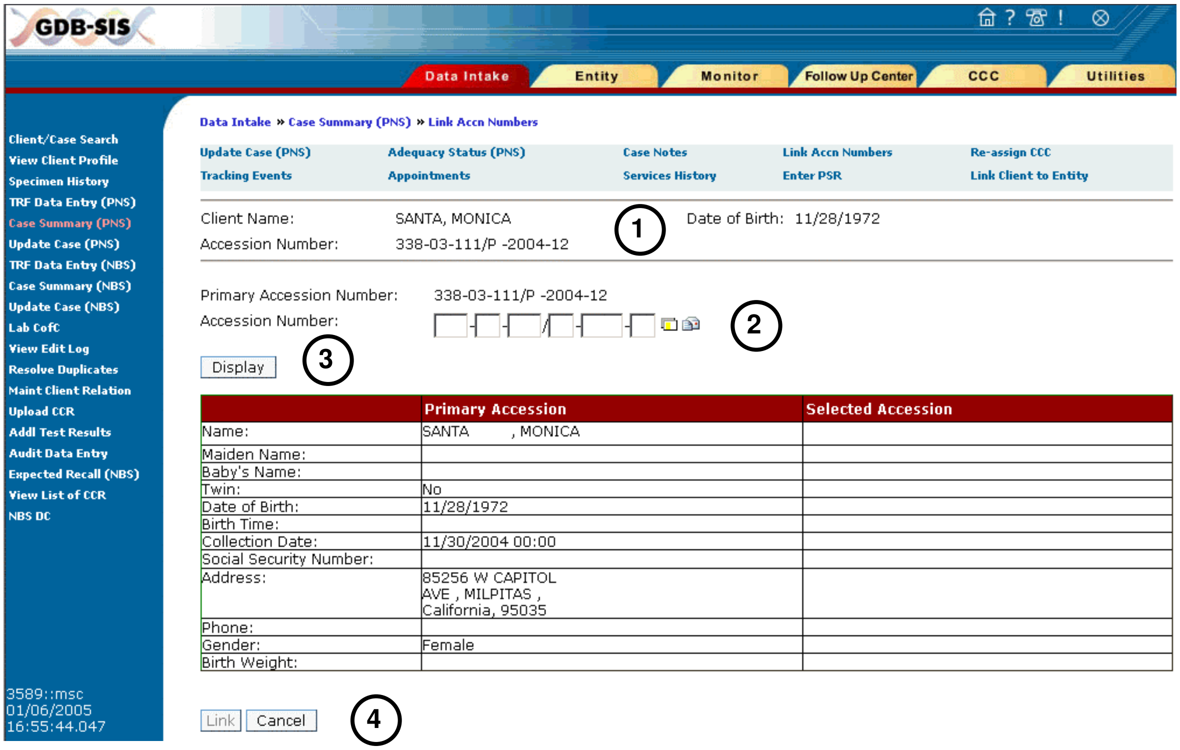
For PNS cases, once the two accession numbers have been linked, SIS will check for the following instances:

1. If the interpretation of the Primary case is ‘Inadequate’ or ‘Too Early’, then a new Diaried Event (used for historical tracking purposes) will be created in SIS for the Primary case.
2. If the interpretation for the Primary case is anything other than ‘Inadequate’ or ‘Too Early’, then the tracking status of the Secondary case will be changed to ‘Unauthorized Redraw’.

For NBS cases, once the two accession numbers have been linked, SIS will check for the following instances:

1. If the Primary case is non-negative, a Diaried Event (used for historical tracking purposes) will be created in SIS.
2. If the Primary case is positive or ‘Early’, the system will change the specimen type for the Secondary case to “Type 31 – Recalls”, except if the initial interpretation is Galactosemia or Hb positive.
3. If the Primary case is ‘Inadequate’ and the Secondary case is ‘Adequate’, the second adequate sample will close the case and create Diaried Events in both cases.

Link Accession Numbers (continued)



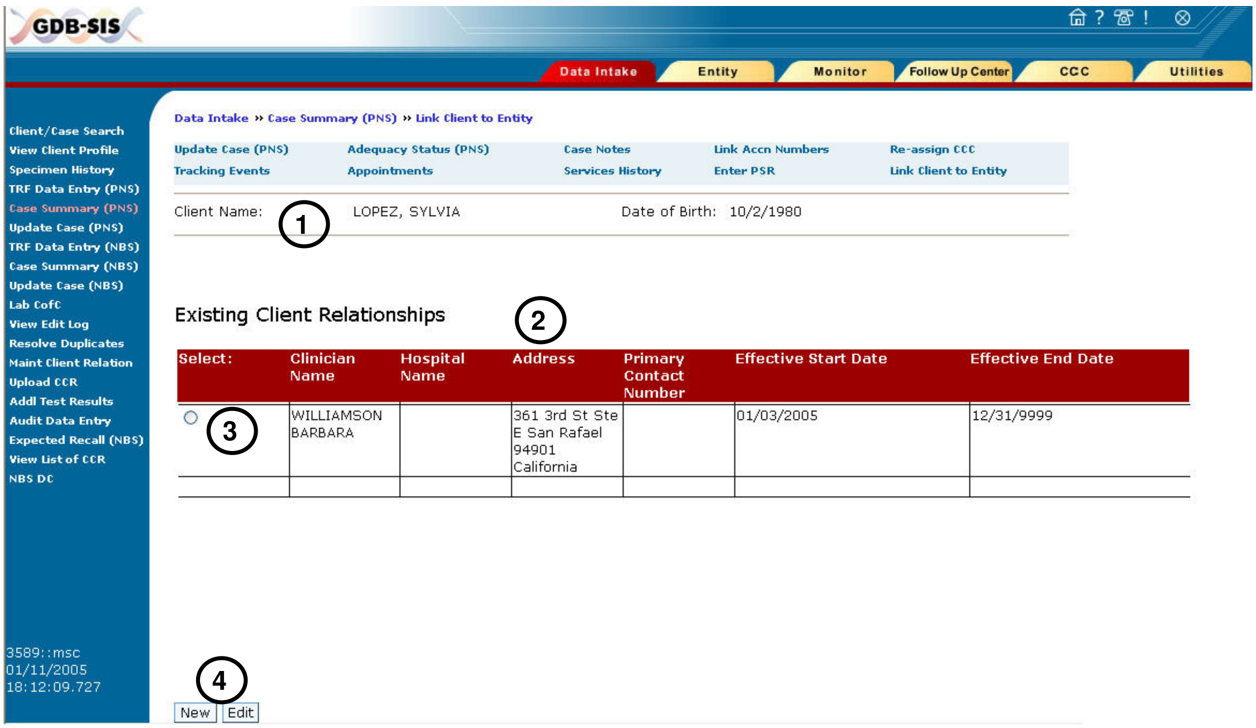
1. The client's basic information is displayed in a read-only format, based on the client profile.
2. Enter the accession number you want to link to the Primary case in the **Accession Number** field.
3. Click the **Display** button to add the second Accession Number and all related information to the Selected Accession column in the grid.
4. **Buttons**:
    a. **Link** – creates a link between the Primary Accession number and the Selected Accession number (Secondary).
    b. **Cancel** – Cancels the current operation.

Link Client to Entity

Data Intake >> Case Summary (PNS) >> Link Client to Entity

The **Link Client to Entity** screen is used to create relationships between clients and entities. Typically a client would be linked to a hospital-type entity or a person-type entity. Please note that only one relationship can be created between a client and a hospital-type entity, and only one relationship can be created between a client and a person-type entity.

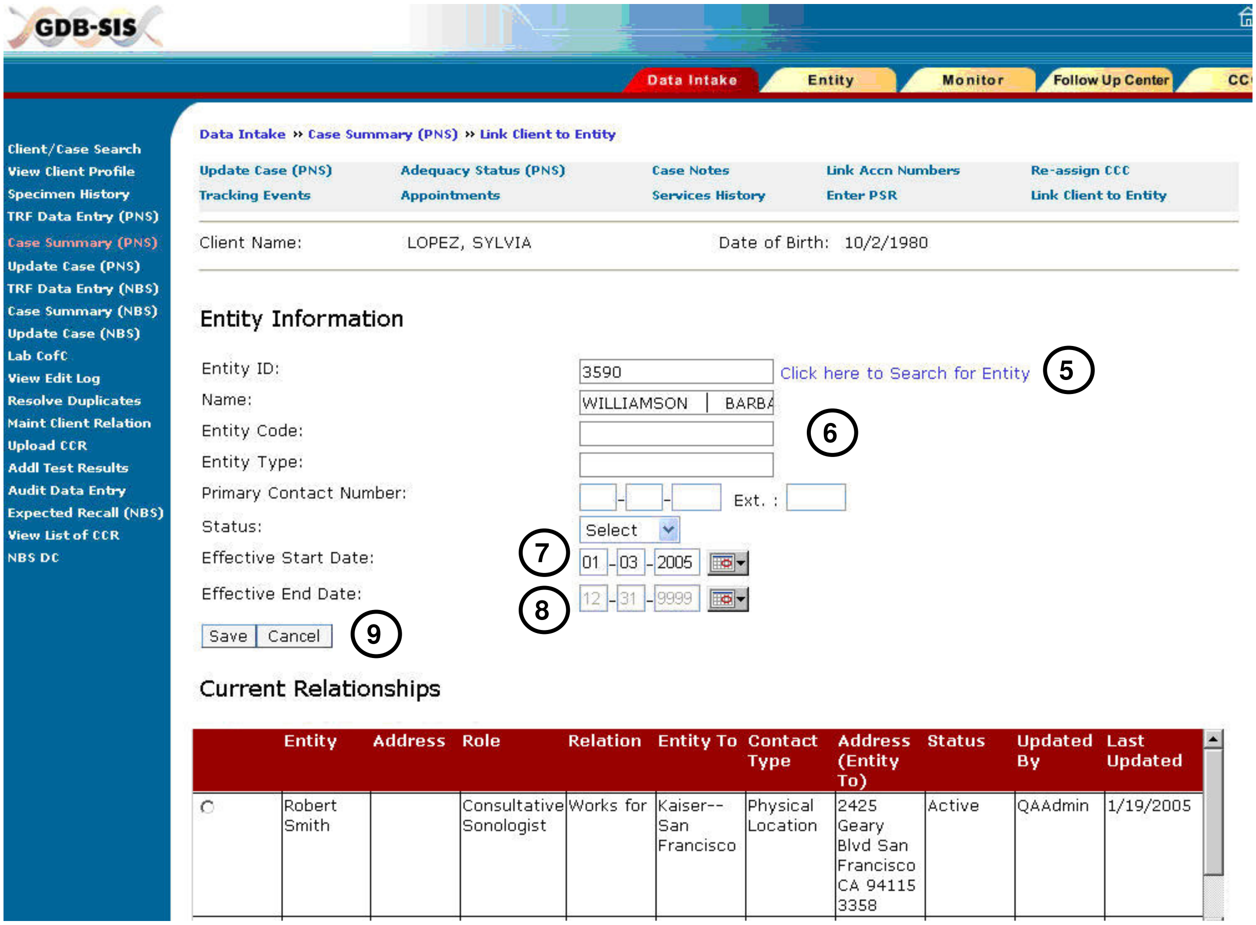
FIGURE 1



1. Client information is displayed in a read-only format based on the information in the Case Summary screen.
2. All of the client's existing entity relationships are displayed in the **Existing Client Relationships** grid.
3. Click the radio button in the **Select** column to select a client relationship for editing.
4. **Buttons:**
    a. Click the **Edit** button to make changes to the selected entity's relationship (see **FIGURE 2**).
    b. Click the **New** button to create a new entity relationship for the client (see **FIGURE 2**).

Link Client to Entity (continued)

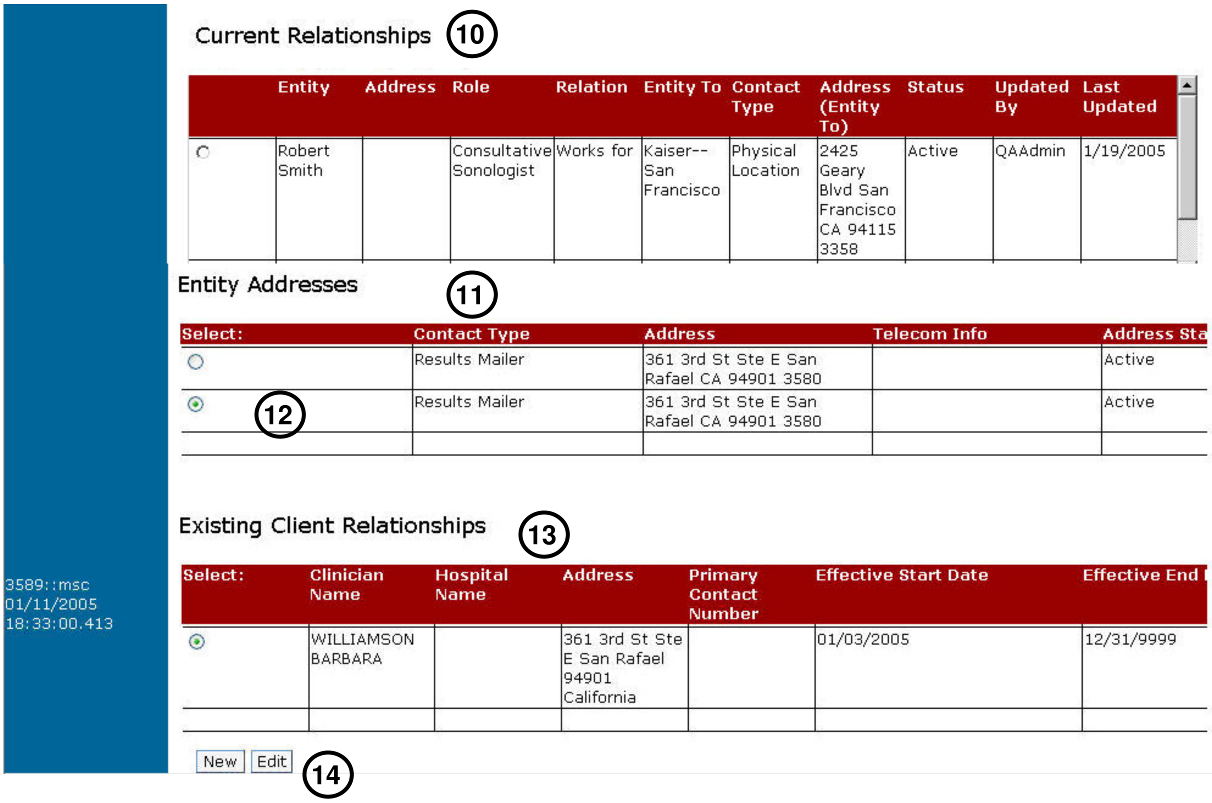
FIGURE 2



5. Click the **Click here to Search for Entity** link to search for the entity you would like to link to the client, or you may enter the entity information directly.
6. After locating an entity, the **Entity ID, Name, Entity Code and Entity Type** will be displayed. The Entity ID is automatically assigned to the entity by SIS at the time of creation and is read-only. The Entity Code is a unique code that identifies the entity according to the GDB/Program standards. The user is responsible for entering this value.
7. Enter the **Effective Start Date** of the client/entity relationship.
8. The **Effective End Date** is read-only, and will be automatically populated with 12/31/9999. If the relationship is modified (i.e. a new address is selected for the entity or a new entity is selected, then the current client/entity relationship will be end-dated with the date of the modification.
9. **Buttons:**
   a. Click the **Save** button to save the client/entity link. Note, you must select an Entity Address in order to create a relationship.
   b. Click the **Cancel** button to cancel the current action.

Link Client to Entity (continued)

FIGURE 3



10. Any existing relationships between the selected entity and other entities (i.e. between a clinician and a hospital) will be displayed in the **Current Relationships** grid.
11. Address records for the selected entity are displayed in the **Entity Address** grid. You must select an Entity Address in order to create a relationship.
12. Click the radio button next to an address record to select it for the relationship you are creating/editing.
13. Existing entity relationships for the selected client are displayed in the **Existing Client Relationships** grid.
14. **Buttons:**
    a. Click the **New** button to create a new client/entity relationship.
    b. Click the **Edit** button to edit the selected relationship.

Note: When adding a new entity relationship, all fields will be blank. When updating an existing entity relationship, the fields will be populated with existing information, and available for editing.

Link NBS Accession Numbers

Data Intake >> Case Summary (NBS) >> Link NBS Accn Numbers

The **Link NBS Accn Numbers** screen allows you to link two NBS accession numbers. The most common use of this screen is to link recalls and redraws. This screen provides the basic information for the two accession numbers side-by-side, in order to help you determine whether they should be linked.

The way the application performs the linking is:

1. The application checks for the specimen of the mother – If the specimen belongs to different mothers, the mother details are merged.
   If the specimen is not a NBS specimen the application displays an error “Only NBS accession numbers can be linked from this screen.” However, if the specimen does not have a mother mapped the application displays the error “Unable to locate the Mother details for the selected client.”
2. Next, the application checks if both the specimens belong to the same client and if they belong to different clients, the clients are merged.

Additional conditions when SIS will not allow the accession numbers to be linked:

1. If both the accession numbers are not NBS related specimens.
2. If the specimen is related to a specimen from Special forms the application displays a message “NBS special forms clients cannot be resolved using this screen. Navigate to "Resolve Duplicates" to merge the NBS special forms client with an existing SIS client.”
3. If the accession numbers are already linked the application displays a message “The accession numbers are already linked.”
4. If the linked accession number is same as the original accession number then the application displays an error “Accession number cannot be linked to itself.”
5. If the program type is NBS and the difference between the accession dates is more than 32 weeks between the cases the application displays a message “Cases which are more than 32 weeks apart cannot be linked.”
6. If the application was not able to merge the two specimens then the application stops both the merge and the link process.

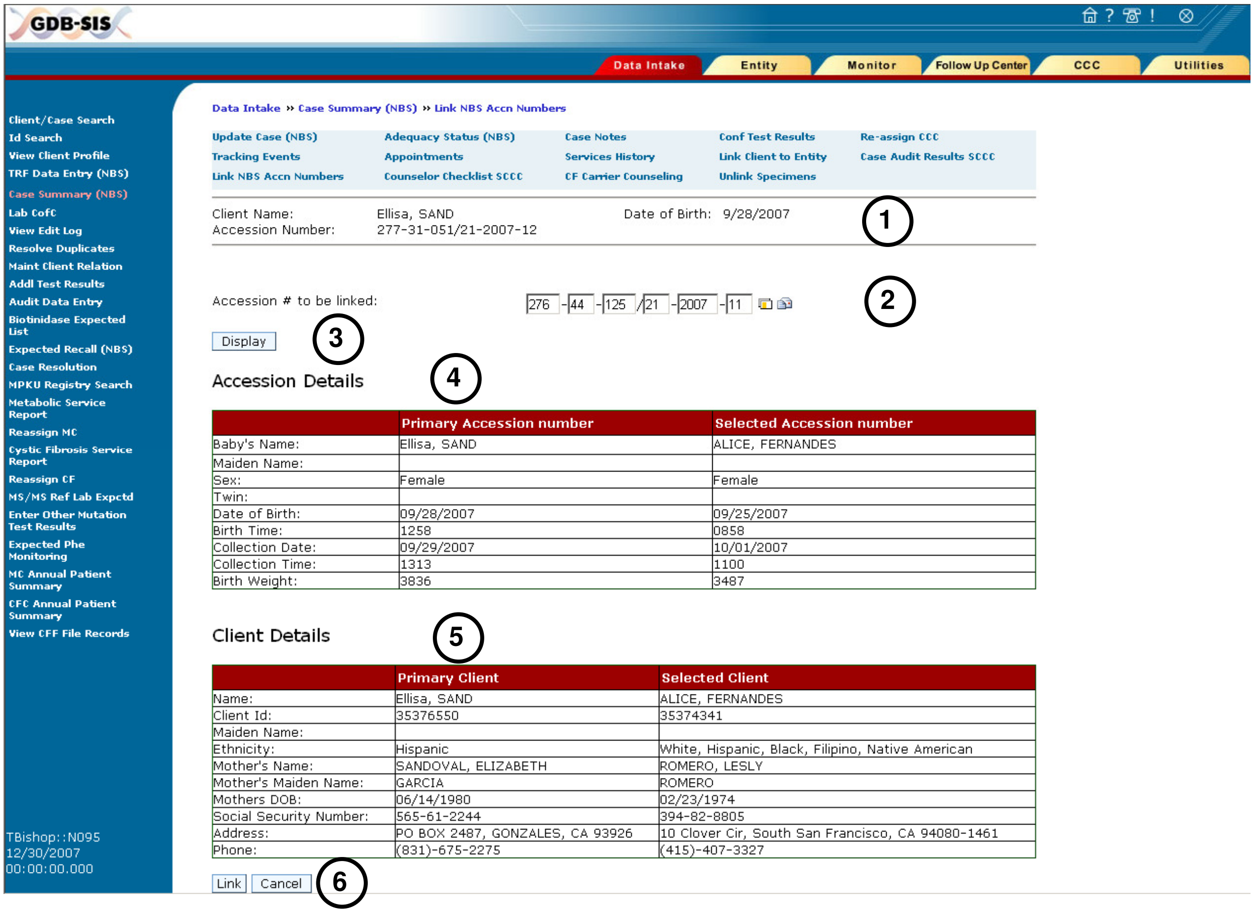
When you initially load this screen, the accession number you were viewing on the Case Summary (NBS) screen is the Primary; the one you will specify in the Accession Number field will be the Secondary.

Once the two accession numbers have been linked, SIS will check for the following instances:

1. If the Primary case is non-negative, a Diaried Event (used for historical tracking purposes) will be created in SIS.
2. If the Primary case is positive or ‘Early’, the system will change the specimen type for the Secondary case to “Type 31 – Recalls”, except if the initial interpretation is Galactosemia or Hb positive.

Link NBS Accn Numbers (continued)

3. If the Primary case is 'Inadequate' and the Secondary case is 'Adequate', the second adequate sample will close the case and create Diaried Events in both cases.



1. The client's basic information is displayed in a read-only format, based on the client profile.
2. Enter the accession number you want to link to the Primary case in the **Accession Number** field.
3. Click the **Display** button to add the Accession Number and all related information to the Selected Accession column in the grid.
4. The accession related information for the Primary and Secondary accession number are displayed here
5. Information related to the two clients of the specimens is displayed in the "Client Details" section.
6. **Buttons**:
   a. **Link** – creates a link between the Primary Accession number and the Selected Accession number (Secondary).
   b. **Cancel** – Cancels the current operation.

Link PNS Cases

Data Intake >> Case Summary (PNS) >> Link PNS Cases

The **Link PNS Cases** (the name of the screen was Link Accession Numbers before PEII) screen allows you to link two accession numbers. The most common uses of this screen include recalls and redraws. This screen provides the basic information for the two accession numbers side-by-side, in order to help you determine whether they should be linked.

Before allowing a link of the two accession numbers, SIS will automatically validate that the two numbers do not belong to different clients. Linked Accession Numbers must always have the same client. If SIS determines that they belong to different clients, the system will not allow them to be linked, and will display an error message. Additional conditions when SIS will not allow the accession numbers to be linked:

1. If the accession numbers are same
2. The accession numbers are already linked.
3. If the accession numbers have different program types.
4. The difference between the accession dates is more than 32 weeks between the specimens.

Also, if the Secondary accession number is prior to the Primary accession number, a warning popup message stating the same will be shown for confirmation.

When you initially load this screen, the accession number you were viewing on the Case Summary (PNS) screen is the Primary; the one you will specify in the Accession Number field will be the Secondary. If two Post-PEII specimens are being linked the user will have an option to edit one or more of the master data fields. If the primary specimen is a Post-PEII specimen and the secondary a Pre-PEII specimen the user will be able to view the master data for the specimens (note that if the primary specimen is a Pre-PEII the master information is not displayed).

For Post-PEII PNS cases, once the two cases (there can multiple specimens in the Primary/secondary) are linked the case is reinterpreted with the specimens and a risk assessment generated and the Tracking status changed accordingly. Mailers are also generated from the SIS application depending on the business rules.
It is important to note here that irrespective of the situation, neither the primary nor the secondary specimens become an ISI specimen (Insufficient Specimen Information) specimen after linking from the "Link PNS" screen.

Link PNS Cases (continued)

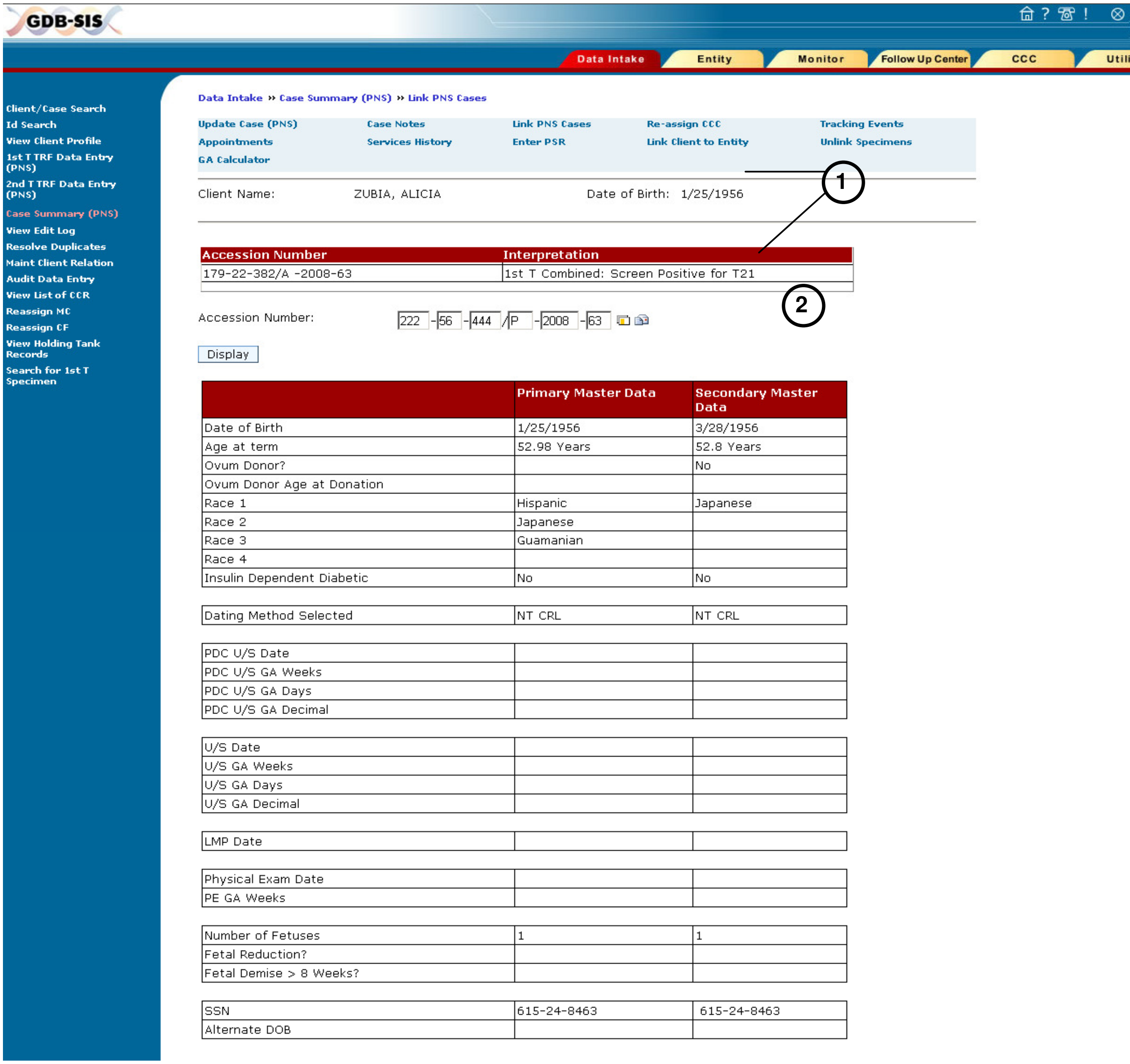
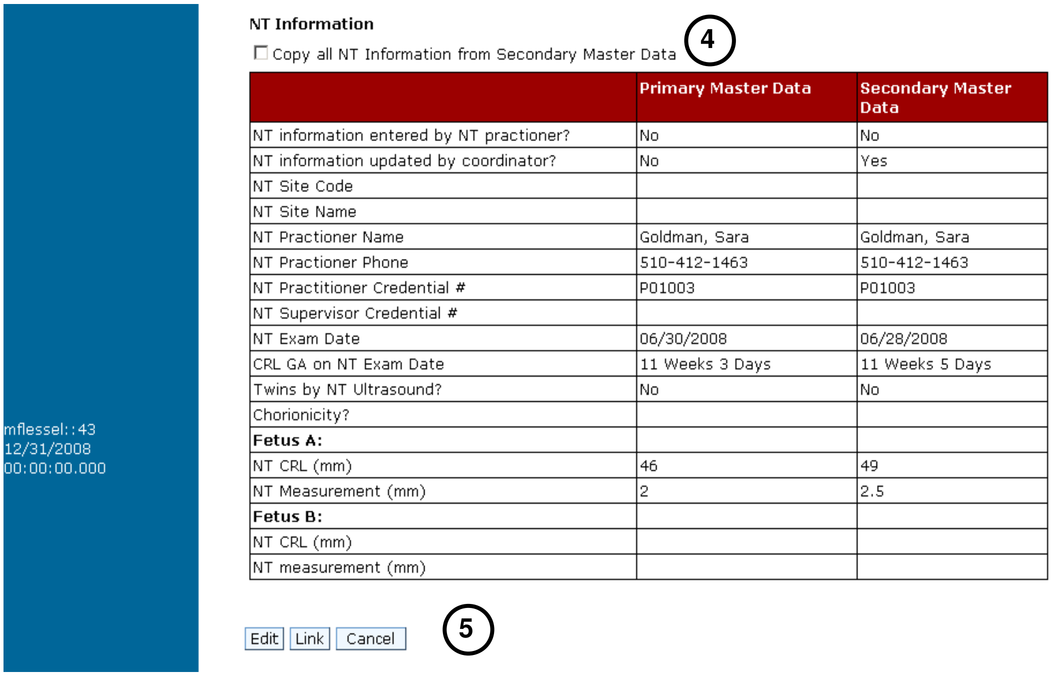


Fig 1: When the Primary specimen is a Post-PEII specimen

1. The client's basic information is displayed in a read-only format, based on the client profile. For Post-PEII cases, all the specimens in the Primary case are displayed along with their Interpretation in a grid format.
2. Enter the accession number you want to link to the Primary case in the **Accession Number** field. For Post-PEII cases, this accession number could belong to any case of the client provided it meets the business rules mentioned earlier.
3. Click the **Display** button to add the second Accession Number and all related information to the "Secondary Master Data" column in the grid.

Link PNS Cases (continued)



NT Information

☐ Copy all NT Information from Secondary Master Data

4

	Primary Master Data	Secondary Master Data
NT information entered by NT practioner?	No	No
NT information updated by coordinator?	No	Yes
NT Site Code		
NT Site Name		
NT Practioner Name	Goldman, Sara	Goldman, Sara
NT Practioner Phone	510-412-1463	510-412-1463
NT Practitioner Credential #	P01003	P01003
NT Supervisor Credential #		
NT Exam Date	06/30/2008	06/28/2008
CRL GA on NT Exam Date	11 Weeks 3 Days	11 Weeks 5 Days
Twins by NT Ultrasound?	No	No
Chorionicity?		
Fetus A:		
NT CRL (mm)	46	49
NT Measurement (mm)	2	2.5
Fetus B:		
NT CRL (mm)		
NT measurement (mm)		

mflessel::43
12/31/2008
00:00:00.000

Edit Link Cancel

5

Fig 2: NT Information when the Primary specimen is a Post-PEII specimen

4. When the “Copy all NT Information from Secondary Master data” is selected the application checks if the <Edit> is clicked (see functionality of “Edit” below) and if so does the following steps:
    a. If the “Copy all NT Information from Secondary Master Data” is selected (i.e. the display is ☑) then NT data from the secondary specimen is copied to the primary specimen (except the “NT information entered by NT Practioner” and “NT information updated by coordinator” fields).
    b. If the “Copy all NT Information from Secondary Master Data” is not selected (i.e. the display is ☐) then the original NT data of the Primary specimen is displayed.

   Please note that <Edit> button needs to be clicked in order to copy the NT data.

5. Buttons:
    a. **Edit –** If the Primary and secondary specimens are Post-PEII specimens then the application will allow the Master and NT information of the Primary specimen information to be changed from the “Link PNS” screen directly before linking.
       If the “Copy all NT Information from Secondary Master Data” is selected then all the NT information fields are copied over from the secondary specimen to the Primary specimen and then displayed.

Link PNS Cases (continued)

b. **Link** – Creates a link between the Primary Accession number and the Selected Accession number (Secondary). If the linking process is successful, the application displays a message “Accession numbers linked successfully” and the complete screen (including master and NT information) is refreshed and displays the updated details after linking

c. **Cancel** – Cancels the current operation.

For Pre-PEII PNS specimens, once the two accession numbers have been linked, SIS will check for the following instances:

1. If the interpretation of the Primary case is ‘Inadequate’ or ‘Too Early’, then a new Diaried Event (used for historical tracking purposes) will be created in SIS for the Primary case.
2. If the interpretation for the Primary case is anything other than ‘Inadequate’ or ‘Too Early’, then the tracking status of the Secondary case will be changed to ‘Unauthorized Redraw’.

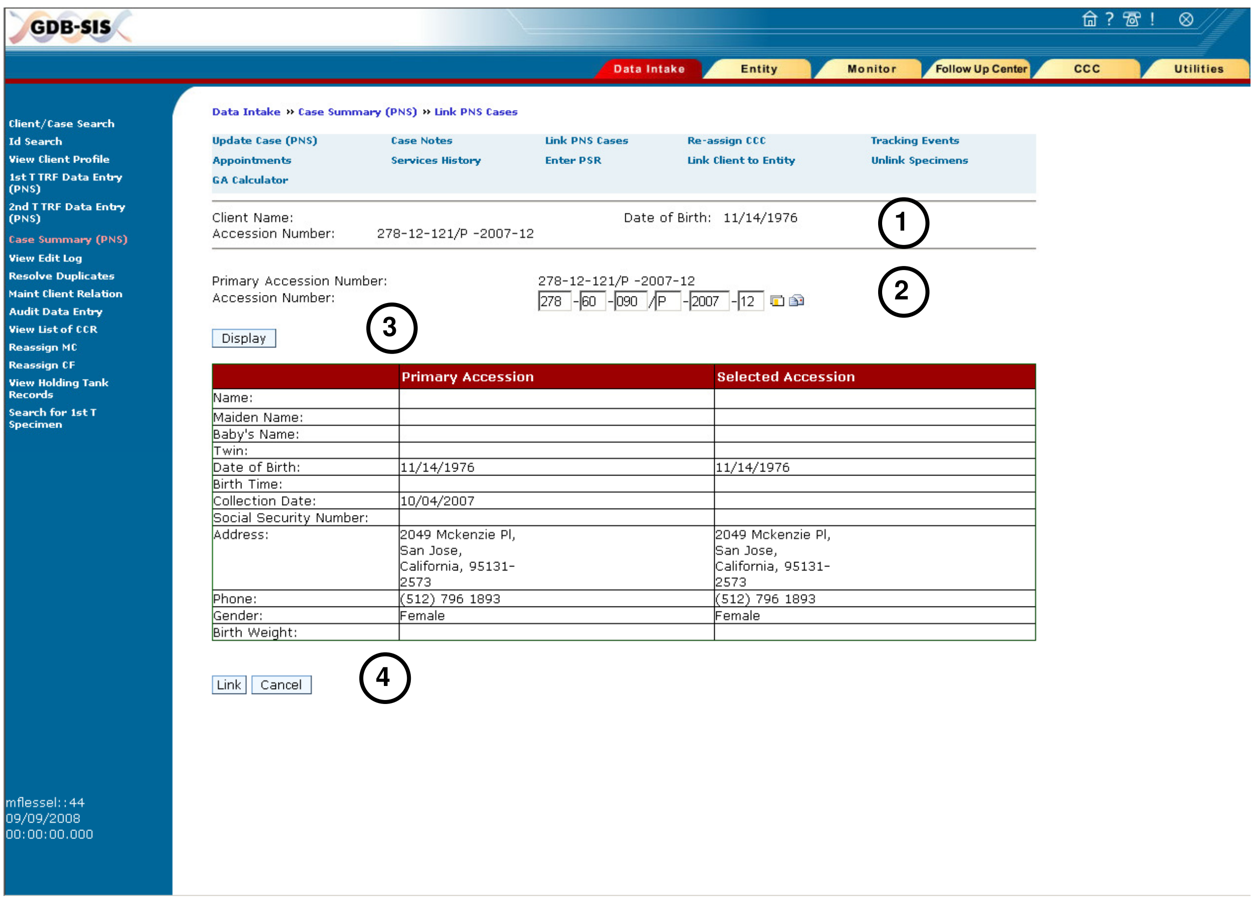


Fig 3: When the Primary specimen is a Pre-PEII specimen

Link PNS Cases (continued)

1. The client's basic information is displayed in a read-only format, based on the client profile.
2. Enter the accession number you want to link to the Primary case in the **Accession Number** field.
3. Click the **Display** button to add the second Accession Number and all related information to the Selected Accession column in the grid.
4. **Buttons**:
    a. **Link** – creates a link between the Primary Accession number and the Selected Accession number (Secondary).
    b. **Cancel** – Cancels the current operation

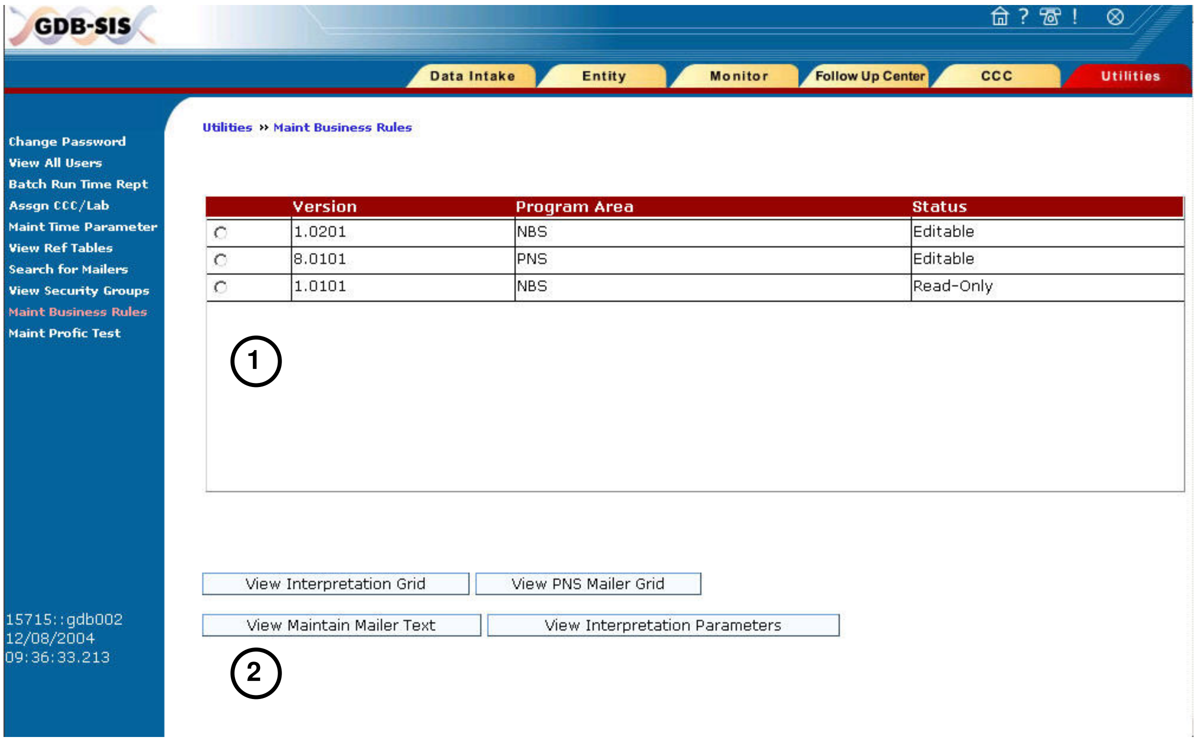
If the primary specimen is a Pre-PEII PNS specimen the application displays a similar screen as Fig 3 but the important distinction between linking Pre-PEII specimens and Post-PEII specimens is that when two Post-PEII specimens are linked then it is possible for the user to edit master and NT information. The interpretation also changes based on the specimens being linked (if two Post-PEII specimens are linked).

However, when either specimen is a Pre-PEII PNS specimen the application does not reinterpret the case and does not allow modification of master and NT Information.

Maintain Business Rules

Utilities >> Maint Business Rules

This screen allows you to view the Maintain Mailer Text, the PNS Interpretation Grid, the NBS Interpretation Grid, and the PNS Interpretation Parameters screens.



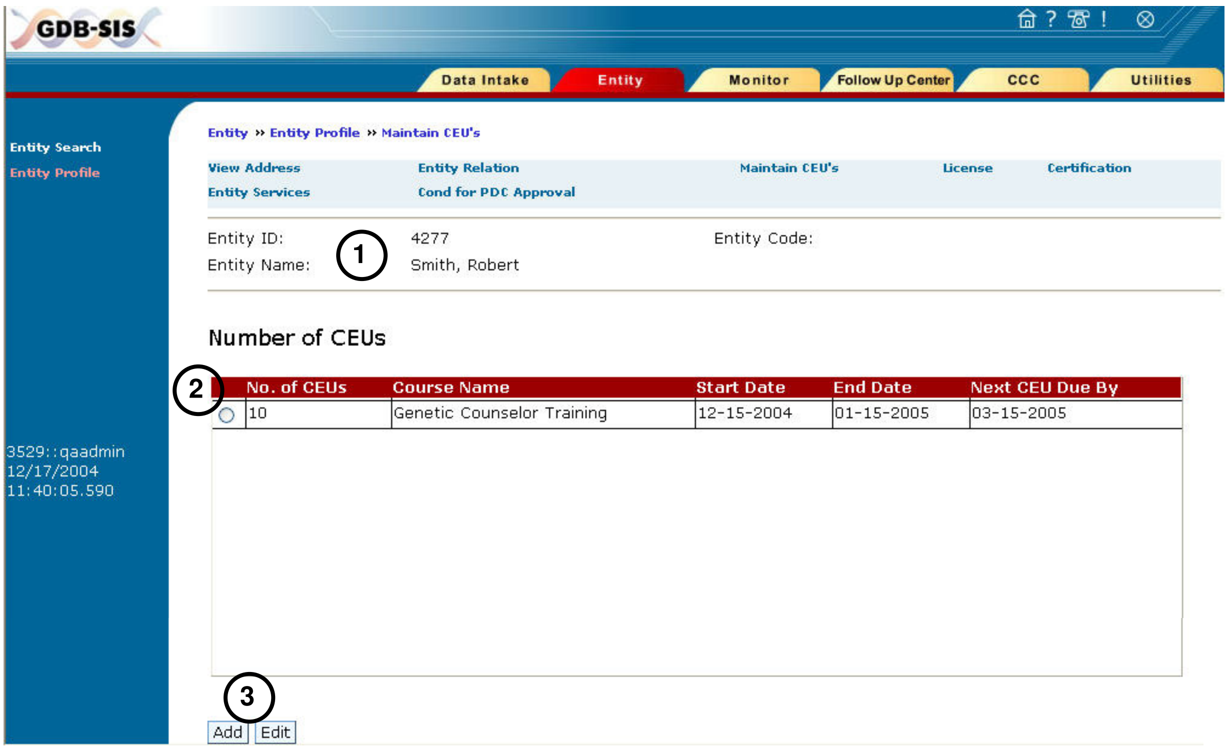
1. This grid displays the status and version number of the interpretation grids for each program area. Use the radio buttons to select which program area grid to view. Only the newest versions of each will be editable. All previous versions will be read-only.
2. **Buttons:**
   a. The **View Interpretation Grid** button directs you to the Interpretation Grid screen for your selected program area (see #1, PNS or NBS), which allows you to view and modify variables that control result mailers, case status, and headline case determination.
   b. The **View PNS Mailer Grid** button directs you to the PNS Mailer Grid screen, which allows you to view the PNS Mailer Grid, and update individual Grid Line Sequence values.
   c. The **View Maintain Mailer Text** button directs you to the Maintain Mailer Text screen for your selected program area (see #1, PNS or NBS), which allows you to search for and update mailers.
   d. The **View Interpretation Parameters** button directs you to the Interpretation Parameters screen for your selected program area (see #1, PNS or NBS), which allows you to view and update the interpretation constant values.

Maintain CEUs

Entity >> Entity Profile >> Maintain CEU's

The **Maintain CEU's** screen is used to view, create and update Course Education Unit (CEU) information for an entity. Typically, CEU information will be tracked for "person-type" entities, however SIS will allow you to enter CEU information for any entity type.

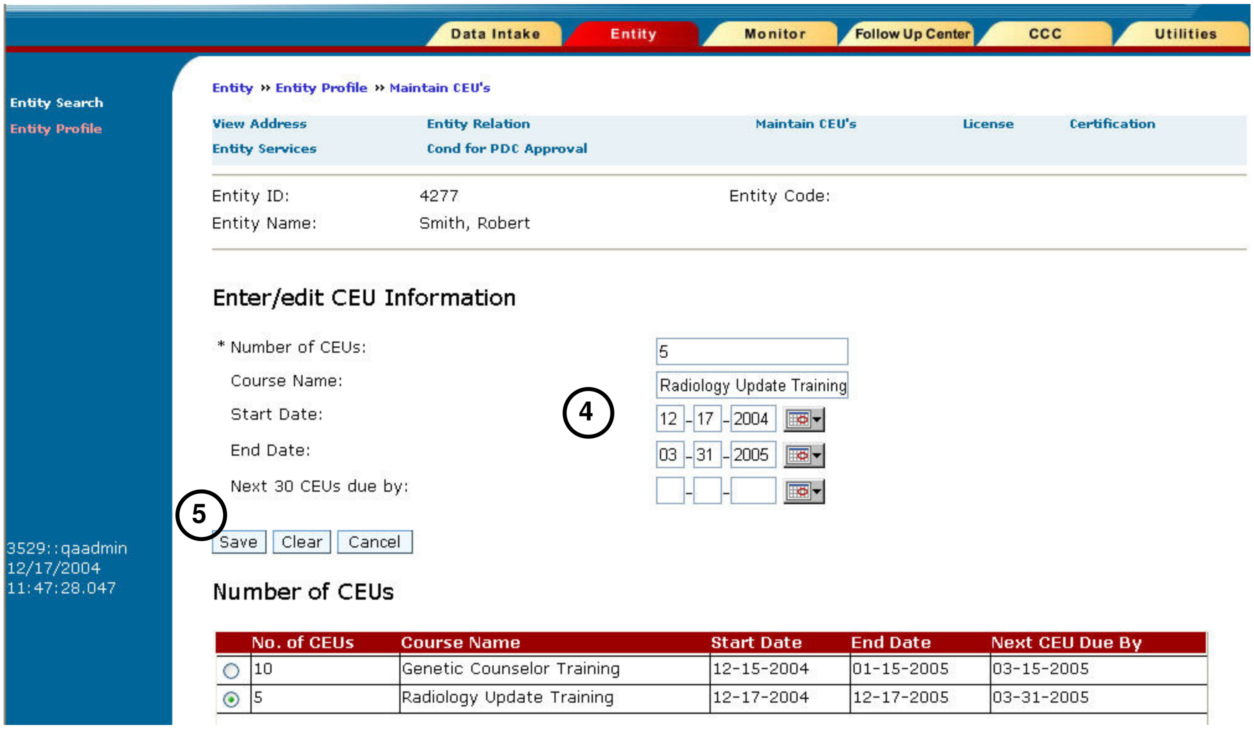
FIGURE 1



1. Information about the entity that is currently selected is displayed in a read-only format. To update this information you must use the Entity Profile screen.
2. The **Number of CEUs** grid displays existing CEU information for the selected entity.
3. **Buttons:**
   a. Click the radio button next to the CEU and then click the **Edit** button to make changes to the selected CEU record (see **FIGURE 2**).
   b. Click the **Add** button to add a new CEU record for the selected entity.

Maintain CEUs (continued)

FIGURE 2



4. For updating the existing CEU information, **Number of CEUs** is a required field. If available, enter the CEU expiration in the **End Date** field. If no value is entered SIS will automatically enter “12/31/9999”. The **Course Name** and **Next CEU Due By** fields will be left blank in the grid if no information is provided.
5. **Buttons:**
   c. Click the **Save** button to save the updated CEU record with the information you entered in the fields above.
   d. Click the **Clear** button to clear the information you have entered discarding any unsaved data.
   e. Click the **Cancel** button to discard any unsaved CEU information you have entered and return to the previous screen.

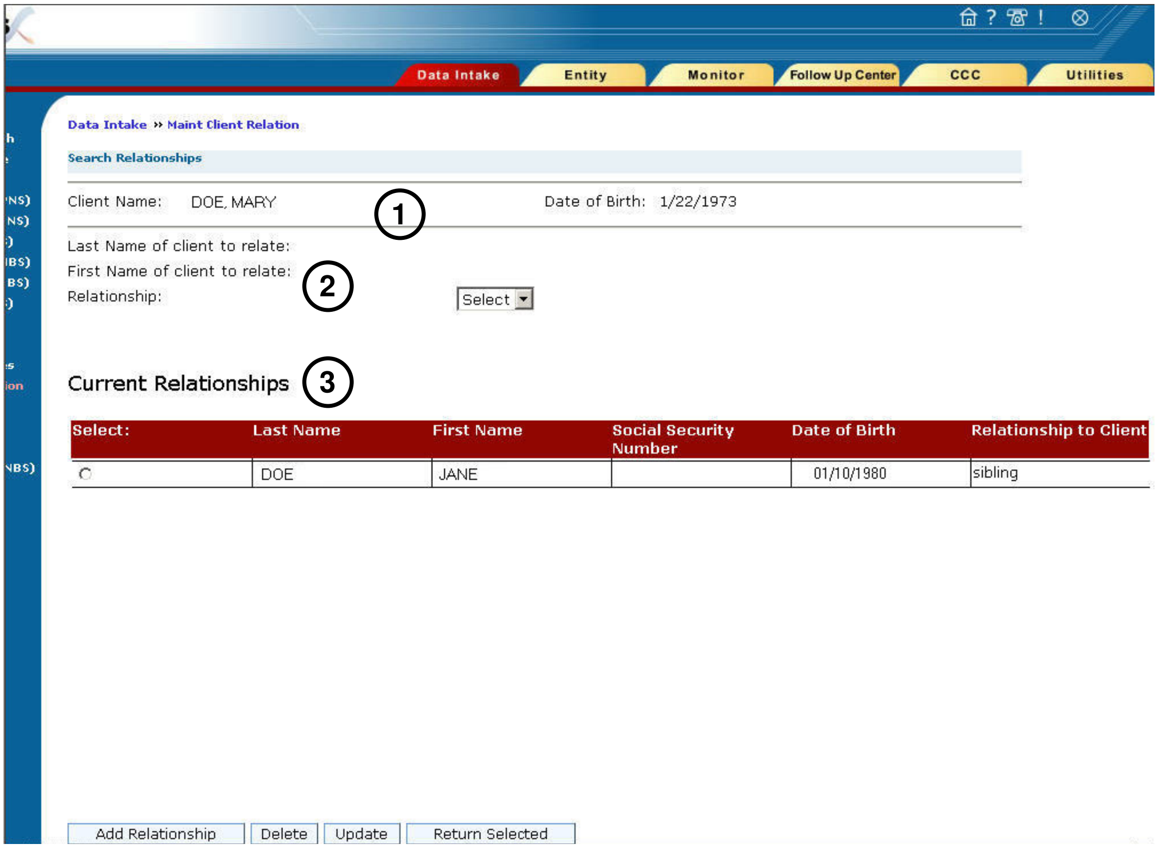
   Note: If you click the Add button instead of the Edit button, the fields will be empty. After clicking Save, a row will be added to the Number of CEU’s grid.

Maintain Client Relationships

Data Intake >> Maint Client Relation

This screen allows you to add new, update existing, or delete relationships between clients, such as child, parent or sibling relationships.

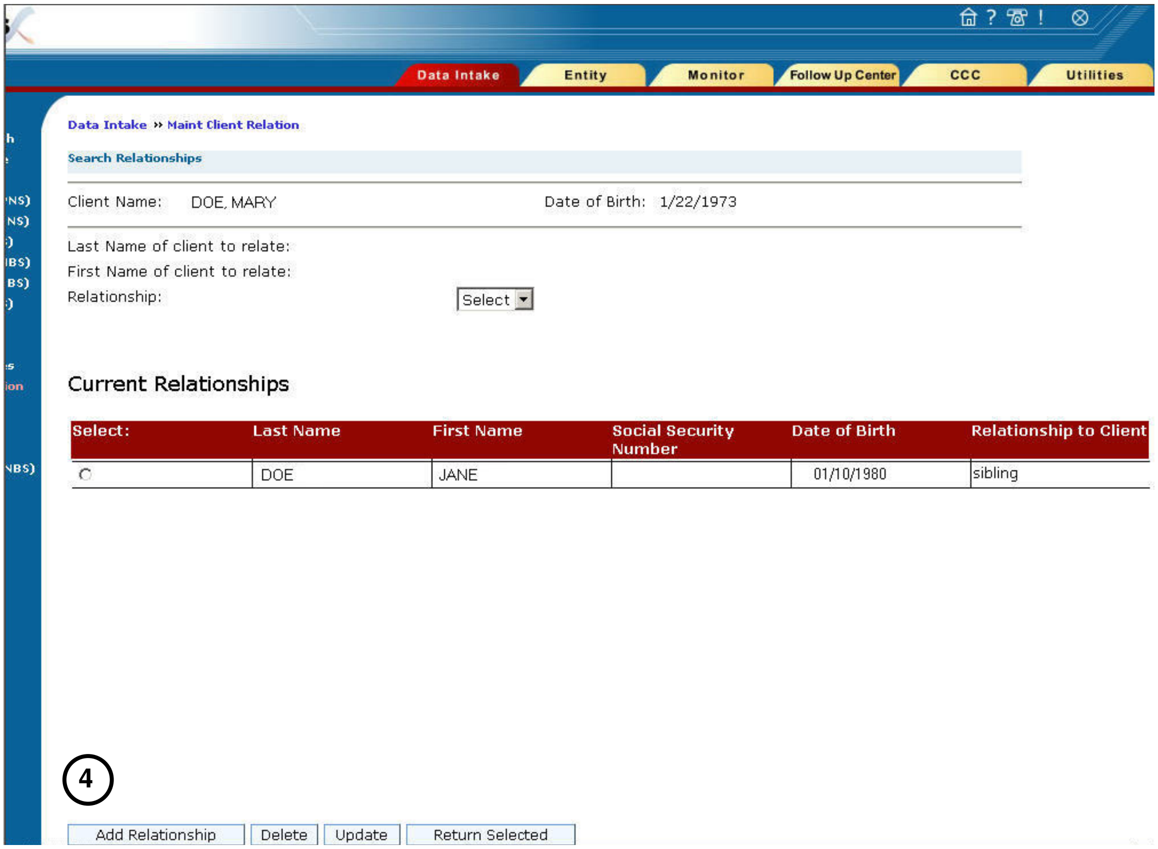
FIGURE 1



1. The Client information is displayed in a read-only format, based on the Client Profile.
2. Information for related client. When you select a client record from the Current Relationships grid, and click the Update button, the selected client's Last Name, First Name and Relationship will be populated in these fields. Last Name and First Name will be displayed in a read-only format. You may update the Relationship.
3. Relationships that have already been created for the client will be displayed in the **Current Relationships** grid.

Maintain Client Relationships (continued)

FIGURE 2



4. **Buttons**:

    a. **Add Relationship** – Directs you to the Search Relationships screen. From this screen, you may search for another client, and create a relationship between the two clients from the Search screen.

    b. **Return Selected** – Returns the relationship data selected (using the radio button) from the grid.

    c. **Delete** – Deletes the relationship record from the Current Relationships grid.

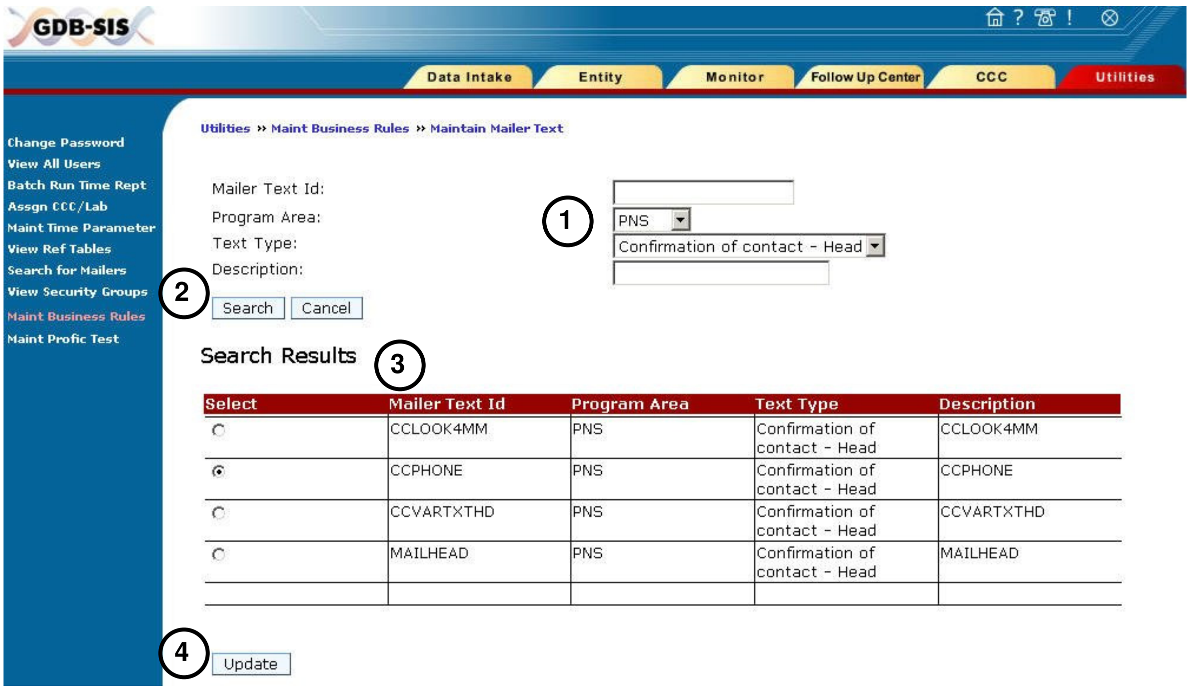
    d. **Update** – When you select a client record from the Current Relationships grid, and click the **Update** button, the selected client's Last Name, First Name and Relationship will be populated in the fields above. Last Name and First Name will be displayed in a read-only format. You may update the Relationship.

Maintain Mailer Text

Utilities >> Maint Business Rules >> Maintain Mailer Text

This screen allows you to search for, view, and update the text of the mailers that will be generated by SIS. The mailers are tied to an interpretation version for either PNS or NBS. Only the mailers associated with the newest interpretation versions will be editable. All previous versions will be read only.

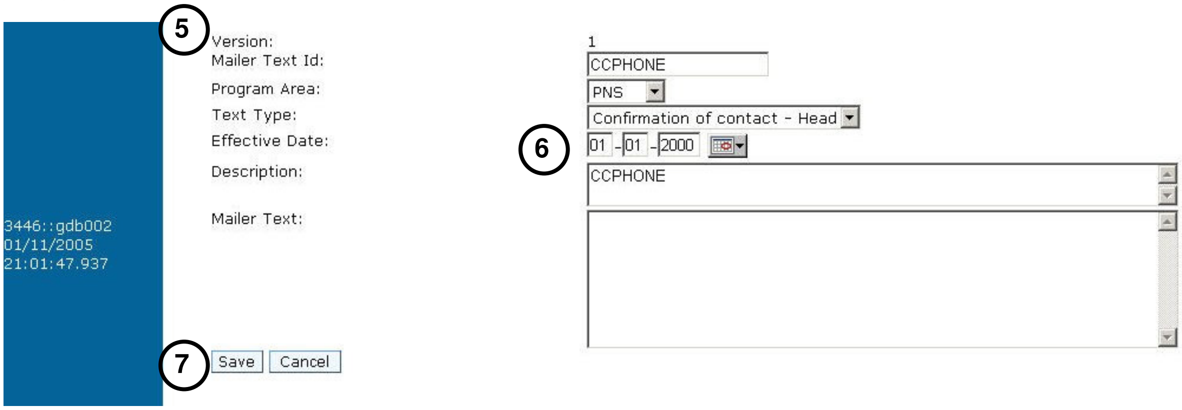
FIGURE 1



1. Any combination of these fields can be used as search criteria.
2. **Button:**
   a. **Search** button will initiate a search based on the search criteria you have entered.
   b. **Cancel** button cancels any unsaved changes, and directs you to the Maintain Business Rules screen, which allows you to view the Maintain Mailer Text, the PNS Interpretation Grid, the NBS Interpretation Grid, and the PNS Interpretation Parameters screens.
3. **Search Results** grid allows you to select the mailer you wish to view and/or edit by using the radio buttons.
4. **Update** button displays the mailer details for the selected mailer record, and allows you to make changes.

Maintain Mailer Text (continued)

FIGURE 2



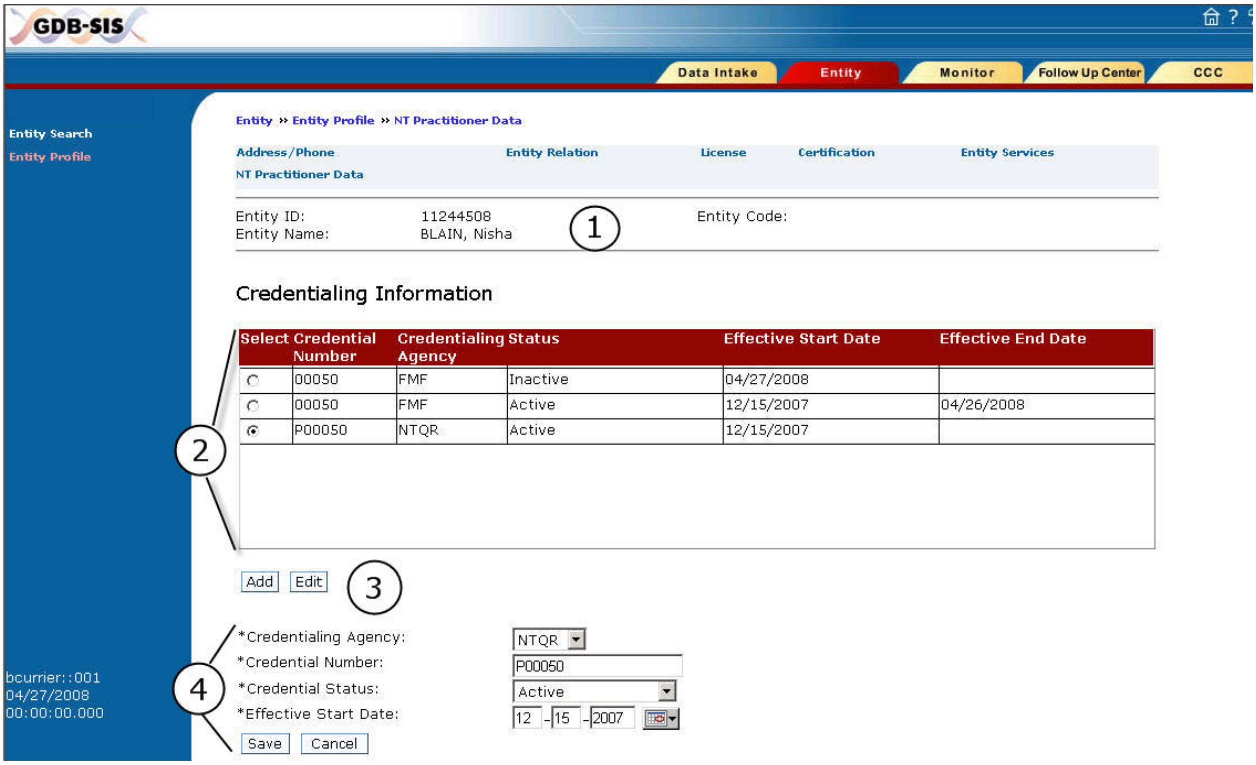
5. The mailer details will only be displayed after a specific mailer has been selected with the radio button, and the **Update** button is clicked.
6. **Effective Date** must be greater than the current date.
7. **Buttons:**
    a. **Save** button will save the updated mailer information in SIS.
    b. **Cancel** button cancels any unsaved changes, and returns you to the Search Results grid.

Maintain NT Sites

Entity » Entity Profile » NT Practitioner Data

The **Maintain NT Sites** screen is used to add or edit credential information for an entity who is a NT Practitioner. This screen is also used to add medians for a NT Practitioner. Only users with security settings for NT Practitioners can maintain this information.

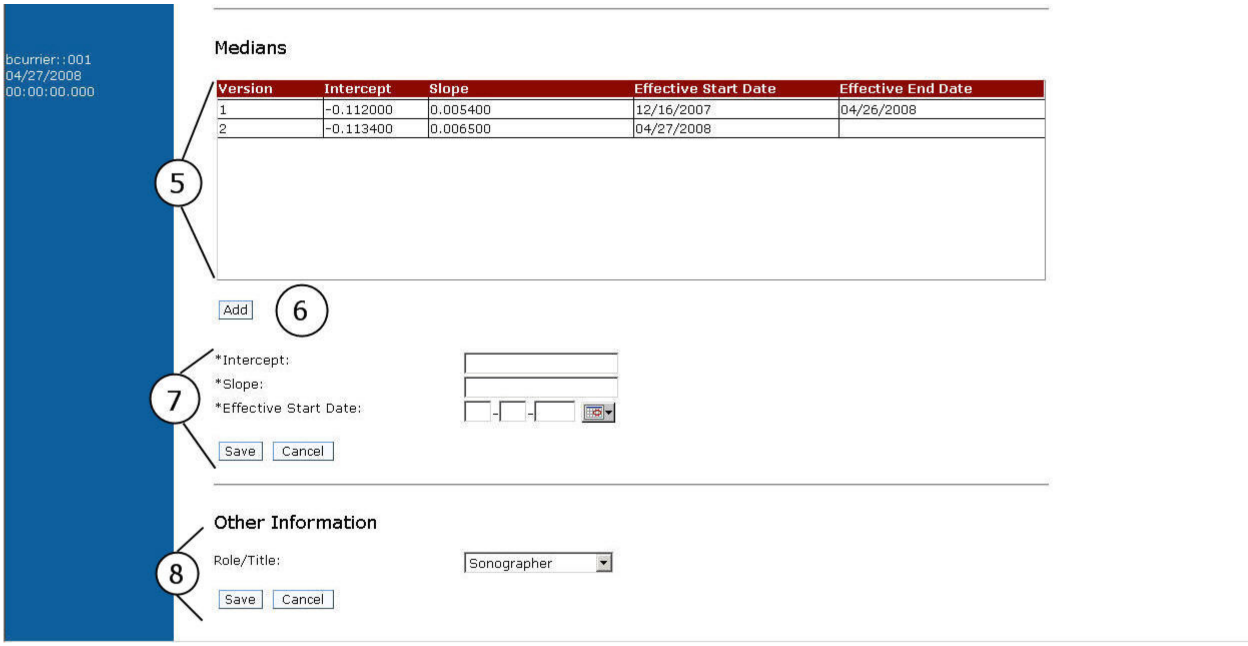
FIGURE 1



1. Information about the selected entity is displayed in a read-only format based on the Entity Profile.
2. The existing credential information of a NT Practitioner is displayed in the **Credentialing Information** datagrid. The effective start and end dates for a credentialing agency (FMF or NTQR) do not overlap.
3. **Buttons:**
   a. On clicking **Add** button, the section 4 is displayed where new credentialing information can be added.
   b. On selecting a record in the **Credentialing Information** datagrid and clicking **Edit** button, the section 4 is displayed with values pre-populated from the record.
4. **Credentialing Agency, Credential Number, Credential Status** and **Effective Start Date** are required fields. On **Save**, a new record is displayed in the **Credentialing Information** datagrid. The effective end date of the new record is set to 12/31/9999 and is displayed as blank. The effective end date of the previous record becomes a day before effective start date of new record.

Maintain NT Sites (continued)

FIGURE 2

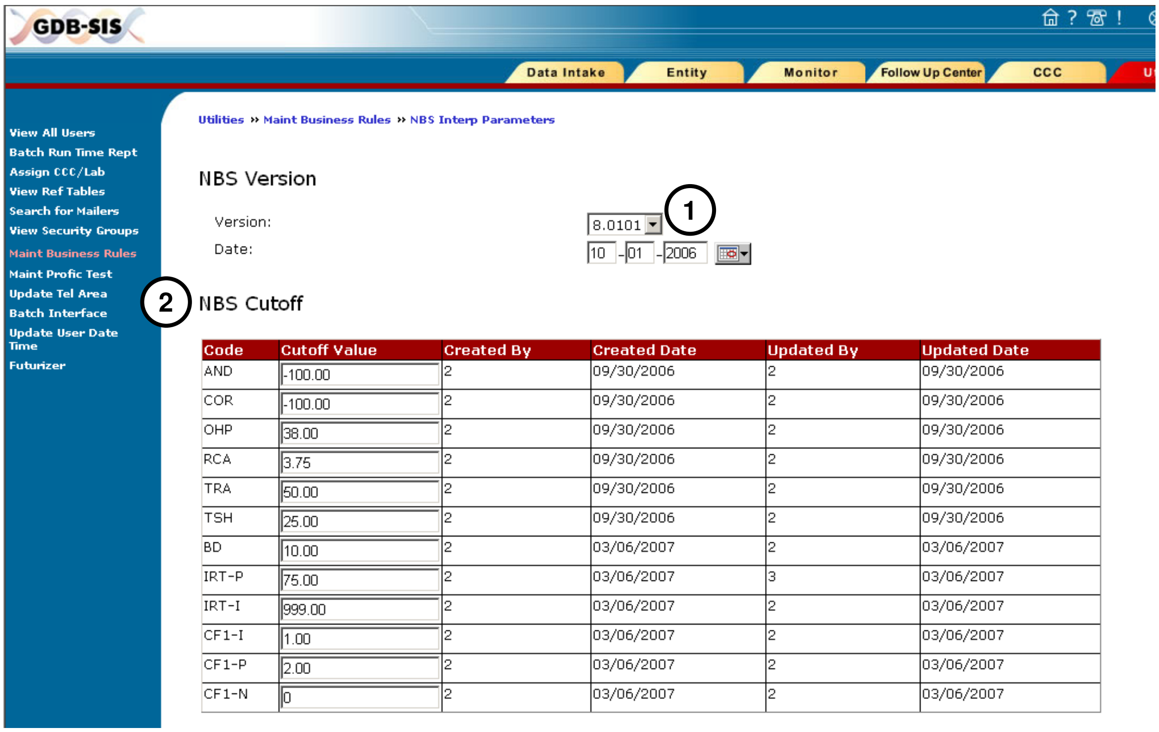


5. The existing intercepts and slopes for a NT Practitioner are displayed in the **Medians** datagrid. The effective start and end dates for a credentialing agency do not overlap.
6. On clicking **Add** button, the section 7 is displayed where new medians can be added.
7. **Intercept, Slope** and **Effective Start Date** are required fields. On **Save**, a new record is displayed in the **Medians** datagrid. The Version number is incremented by 1 on every addition. The effective end date of the new record is set to 12/31/9999 and is displayed as blank. The effective end date of the previous record becomes a day before effective start date of new record.
8. Role/Title for the NT Practitioner can be added in the Other Information section. The field is not mandatory.

Maintain NBS Interpretation Parameters

Utilities >> Maint. Business Rules >>NBS Interp. Parameters
This screen is used to view and maintain all interpretation parameters used in the NBS algorithms in SIS.

FIGURE 1



1. Use the **Version** dropdown box to select the NBS Interpretation Parameters version to be viewed. The version **Date** will be displayed automatically based on the version you select.
2. The **NBS Cutoff** grid displays the cutoff values for each analyte. If you are viewing the newest version, you will be able to make changes to the Cutoff Value fields. If you are viewing an older version, the Cutoff Value fields will be read-only.

Maintain NBS Interpretation Parameters (continued)

FIGURE 2

3 NBS Birth Weight Range

Code	Version	Upper Limit	Lower Limit	Indeterminate Cutoff	Positive Cutoff	Sort Order	Delete Flag	Created By	Created Date	Updated By	Updated Date
33	8.0000	999	0	220.000000	600	1	N	2	09/30/2006	2	09/30/2006
34	8.0000	1499	1000	220.000000	250	2	N	2	09/30/2006	2	09/30/2006
35	8.0000	2499	1500	150.000000	210	3	N	2	09/30/2006	2	09/30/2006
36	8.0000	9999	2500	120.000000	180	4	N	2	09/30/2006	2	09/30/2006

4 NBS MSMS Range

Code	Version	Min. Age at Collection in Days	Max. Age at Collection in Days	Min. Birth Weight in Grams	Max. Birth Weight in Grams	Sort Order	Delete Flag	Created By	Created Date	Updated By	Updated Date
RG1	8.0000	0	10	0	1500	1	N	2	09/30/2006	2	09/30/2006
RG2	8.0000	0	10	1500	9999	2	N	2	09/30/2006	2	09/30/2006
RG3	8.0000	11	99	0	9999	3	N	2	09/30/2006	2	09/30/2006

3. **NBS Birth Weight Range:** The Upper Limit, Lower Limit, Indeterminate Cutoff and Positive Cutoff field values may be changed, if applicable.
4. **NBS MSMS Range:** The Min. Age of Collection in Days, Max. Age of Collection in Days, Min. Birth Weight in Grams and Max. Birth Weight in Grams values may be changed, if applicable.

Maintain NBS Interpretation Parameters (continued)

FIGURE 3

5

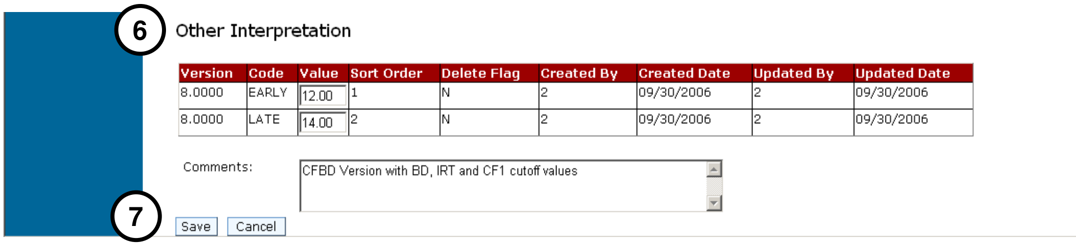
NBS MSMS Analyte Range

Code	Version	Analyte Code	Panel Code	Cut-off Code	Analyte Category Code	Elevation	Lower Cutoff	Upper Cutoff	Sort Order	Delete Flag	Created By	Created Date	Updated By	Updated Date
RG1	8.0000	ALA	AMN	H	A	O	0	900.0000	2	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	ARG	AMN	H	A	P	0	200.0000	3	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	C02	ACL	B	A	O	5.0000	85.0000	5	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	C03	ACL	H	A	O	0	6.5000	6	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	C03DC	ACL	H	A	P	0	0.3000	7	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	C04	ACL	H	A	P	0	1.8000	8	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	C04DC	ACL	H	A	O	0	2.6000	9	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	C05	ACL	H	A	P	0	1.2000	10	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	C051	ACL	H	A	R	0	0.4000	11	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	C05DC	ACL	H	A	P	0	0.3500	12	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	C05OH	ACL	H	A	P	0	1.2000	13	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	C06	ACL	H	A	O	0	0.7000	14	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	C08	ACL	H	A	P	0	0.5000	15	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	C081	ACL	H	A	O	0	0.9000	16	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	C10	ACL	H	A	O	0	0.6000	17	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	C101	ACL	H	A	O	0	0.4500	18	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	C12	ACL	H	A	O	0	2.0000	19	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	C121	ACL	N	A	N	-1.0000	9999.9999	20	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	C14	ACL	H	A	R	0	1.1000	21	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	C141	ACL	H	A	P	0	0.8000	22	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	C14OH	ACL	H	A	R	0	0.4000	23	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	C16	ACL	H	A	P	0	10.0000	24	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	C161	ACL	H	A	R	0	1.2000	25	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	C16OH	ACL	H	A	P	0	0.3000	26	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	C18	ACL	H	A	R	0	3.5000	27	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	C181	ACL	H	A	R	0	4.0000	28	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	C181OH	ACL	H	A	R	0	0.3500	29	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	C182	ACL	N	A	R	-1.0000	9999.9999	30	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	C18OH	ACL	H	A	R	0	0.4000	31	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	CIT	AMN	H	A	P	0	90.0000	32	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	FC	ACL	B	A	O	12.0000	220.0000	33	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	GLY	AMN	N	A	N	-1.0000	9999.9999	35	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	MET	AMN	H	A	R	0	100.0000	36	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	ORN	AMN	H	A	P	0	500.0000	37	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	OXP	AMN	N	A	N	-1.0000	9999.9999	38	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	PHE	AMN	H	A	O	0	140.0000	39	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	PRO	AMN	H	A	R	0	1000.0000	40	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	R14_12	ACL	N	R	N	-1.0000	9999.9999	41	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	R3_2	ACL	H	R	O	0	0.2500	42	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	R8_10	ACL	N	R	N	-1.0000	9999.9999	43	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	RA_O	AMN	N	R	N	-1.0000	9999.9999	44	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	RC_A	AMN	N	R	N	-1.0000	9999.9999	45	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	RF_C	ACL	H	R	R	0	100.0000	46	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	RF_Y	AMN	H	R	O	0	2.3000	47	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	RL_A	AMN	H	R	O	0	1.5000	48	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	RO_C	AMN	N	R	N	-1.0000	9999.9999	49	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	TYR	AMN	H	A	P	0	700.0000	50	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	VAL	AMN	N	A	N	-1.0000	9999.9999	51	N	2	09/30/2006	2	09/30/2006
RG1	8.0000	XLE	AMN	H	A	O	0	200.0000	52	N	2	09/30/2006	2	09/30/2006

5. **NBS MS/MS Analyte Range:** The Lower Cutoff and Upper Cutoff fields may be changed if applicable.

Maintain NBS Interpretation Parameters (continued)

FIGURE 4



Version	Code	Value	Sort Order	Delete Flag	Created By	Created Date	Updated By	Updated Date
8.0000	EARLY	12.00	1	N	2	09/30/2006	2	09/30/2006
8.0000	LATE	14.00	2	N	2	09/30/2006	2	09/30/2006

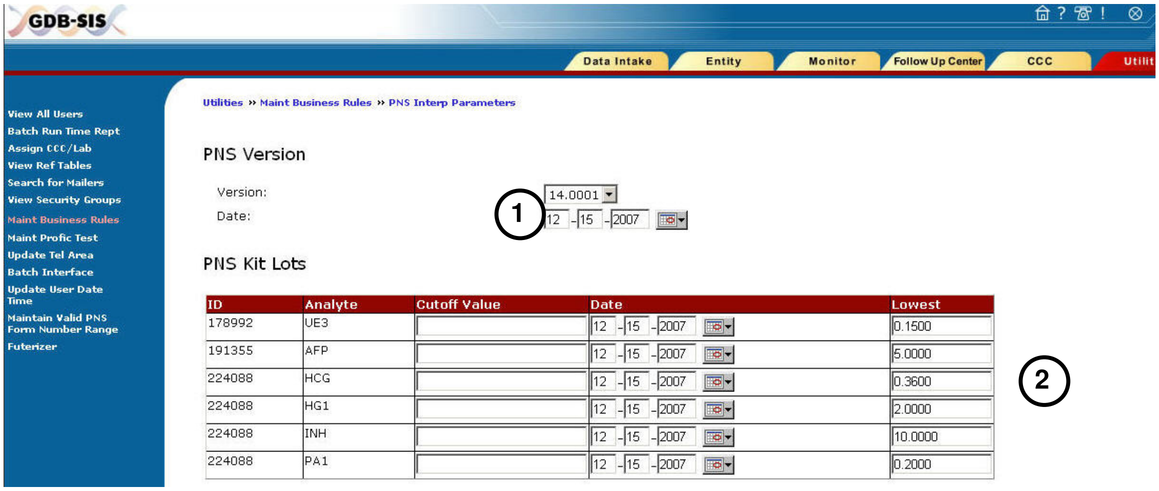
6. **Other Interpretation:** The Value field for each interpretation type may be changed, if applicable.
7. **Buttons:**
    a. **Save:** Updates any changes made to the interpretation parameters.
    b. **Cancel:** Disregards any changes and directs the user to the Maintain Business Rules screen.

Maintain PNS Interpretation Parameters

Utilities >> Maint Business Rules >> PNS Interp Parameters

This screen allows you to view and update all interpretation parameters used in the PNS algorithm in SIS.

FIGURE 1



1. Use the version dropdown box to select the PNS Interpretation parameters to be viewed. If you are viewing the newest version of the interpretation parameters, you will be able to make changes to the interpretation parameter fields as necessary. If you are viewing an older version, the fields will be read-only. Any change in the current version values will automatically create a new version. User has the option to set the start date of a newer version. Use the dropdown box to select the PNS Interpretation Parameters **Version** you would like to view. The version **Date** will be displayed automatically based on the selected version you select.
2. **PNS Kit Lots:** The Cutoff Value, Date, and Lowest fields may be edited.

Note: Each grid contains some values which may be edited. Other fields are not available for updating.

Maintain PNS Interpretation Parameters (continued)

FIGURE 2

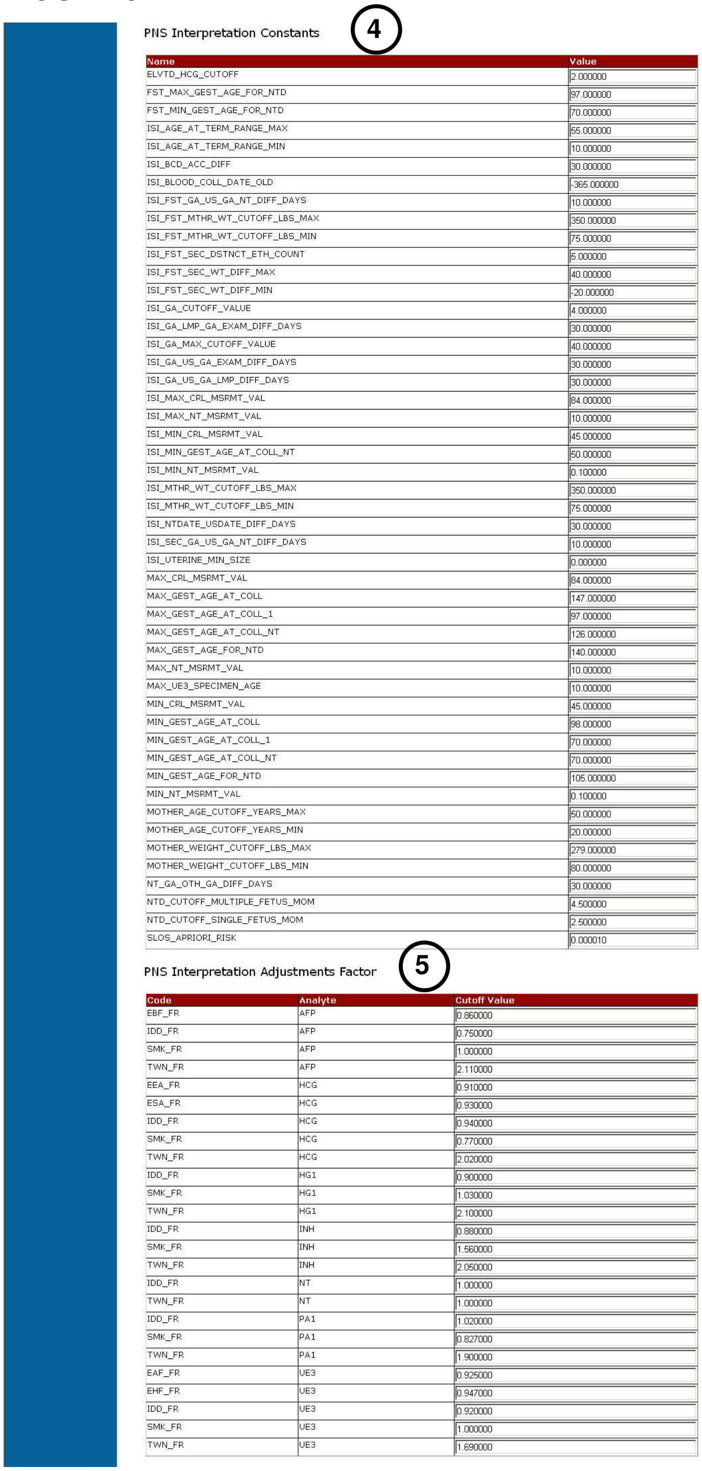
PNS Adjustment Factor Dating 3

Code	Analyte	Parameter	Adjustment Value
L	AFP	ADJ_IN	0.272800
L	AFP	ADJ_SL	108.214040
L	AFP	MED_IN	0.428090
L	AFP	MED_SL	0.009580
L	HCG	ADJ_IN	0.436000
L	HCG	ADJ_SL	85.240000
L	HCG	MED_C1	13.546000
L	HCG	MED_C2	-0.066000
L	HCG	MED_C3	9.800000
L	HG1	ADJ_IN	0.902460
L	HG1	ADJ_SL	62.007000
L	HG1	MED_IN	2.468000
L	HG1	MED_SL	-0.007200
L	INH	ADJ_IN	0.583220
L	INH	ADJ_SL	71.680100
L	INH	MED_C1	672.113130
L	INH	MED_C2	-8.258250
L	INH	MED_C3	0.033930
L	PA1	ADJ_IN	0.994540
L	PA1	ADJ_SL	53.067520
L	PA1	MED_IN	-1.750000
L	PA1	MED_SL	0.025000
L	UE3	ADJ_IN	0.665860
L	UE3	ADJ_SL	46.527420
L	UE3	MED_IN	-1.665850
L	UE3	MED_SL	0.015170
N	AFP	ADJ_IN	0.400000
N	AFP	ADJ_SL	88.980000
N	AFP	MED_IN	0.620000
N	AFP	MED_SL	0.010000
N	HCG	ADJ_IN	0.230000
N	HCG	ADJ_SL	114.020000
N	HCG	MED_C1	15.550000
N	HCG	MED_C2	-0.090000
N	HCG	MED_C3	12.800000
N	HG1	ADJ_IN	0.510000
N	HG1	ADJ_SL	100.000000
N	HG1	MED_IN	2.470000
N	HG1	MED_SL	-0.010000
N	INH	ADJ_IN	0.330000
N	INH	ADJ_SL	99.780000
N	INH	MED_C1	696.510000

3. **PNS Adjustment Factor Dating:** The Adjustment Value field may be edited.

Maintain PNS Interpretation Parameters (continued)

FIGURE 3



PNS Interpretation Constants 4

Name	Value
ELVTD_HCG_CUTOFF	2.000000
FST_MAX_GEST_AGE_FOR_NTD	97.000000
FST_MIN_GEST_AGE_FOR_NTD	70.000000
ISI_AGE_AT_TERM_RANGE_MAX	55.000000
ISI_AGE_AT_TERM_RANGE_MIN	10.000000
ISI_BCD_ACC_DIFF	30.000000
ISI_BLOOD_COLL_DATE_OLD	-365.000000
ISI_FST_GA_US_GA_NT_DIFF_DAYS	10.000000
ISI_FST_MTHR_WT_CUTOFF_LBS_MAX	350.000000
ISI_FST_MTHR_WT_CUTOFF_LBS_MIN	75.000000
ISI_FST_SEC_DSTNCT_ETH_COUNT	5.000000
ISI_FST_SEC_WT_DIFF_MAX	40.000000
ISI_FST_SEC_WT_DIFF_MIN	-20.000000
ISI_GA_CUTOFF_VALUE	4.000000
ISI_GA_LMP_GA_EXAM_DIFF_DAYS	30.000000
ISI_GA_MAX_CUTOFF_VALUE	40.000000
ISI_GA_US_GA_EXAM_DIFF_DAYS	30.000000
ISI_GA_US_GA_LMP_DIFF_DAYS	30.000000
ISI_MAX_CRL_MSRMT_VAL	84.000000
ISI_MAX_NT_MSRMT_VAL	10.000000
ISI_MIN_CRL_MSRMT_VAL	45.000000
ISI_MIN_GEST_AGE_AT_COLL_NT	50.000000
ISI_MIN_NT_MSRMT_VAL	0.100000
ISI_MTHR_WT_CUTOFF_LBS_MAX	350.000000
ISI_MTHR_WT_CUTOFF_LBS_MIN	75.000000
ISI_NTDATE_USDATE_DIFF_DAYS	30.000000
ISI_SEC_GA_US_GA_NT_DIFF_DAYS	10.000000
ISI_UTERINE_MIN_SIZE	0.000000
MAX_CRL_MSRMT_VAL	84.000000
MAX_GEST_AGE_AT_COLL	147.000000
MAX_GEST_AGE_AT_COLL_1	97.000000
MAX_GEST_AGE_AT_COLL_NT	126.000000
MAX_GEST_AGE_FOR_NTD	140.000000
MAX_NT_MSRMT_VAL	10.000000
MAX_UE3_SPECIMEN_AGE	10.000000
MIN_CRL_MSRMT_VAL	45.000000
MIN_GEST_AGE_AT_COLL	98.000000
MIN_GEST_AGE_AT_COLL_1	70.000000
MIN_GEST_AGE_AT_COLL_NT	70.000000
MIN_GEST_AGE_FOR_NTD	105.000000
MIN_NT_MSRMT_VAL	0.100000
MOTHER_AGE_CUTOFF_YEARS_MAX	50.000000
MOTHER_AGE_CUTOFF_YEARS_MIN	20.000000
MOTHER_WEIGHT_CUTOFF_LBS_MAX	279.000000
MOTHER_WEIGHT_CUTOFF_LBS_MIN	80.000000
NT_GA_OTH_GA_DIFF_DAYS	30.000000
NTD_CUTOFF_MULTIPLE_FETUS_MOM	4.500000
NTD_CUTOFF_SINGLE_FETUS_MOM	2.500000
SLOS_APRIORI_RISK	0.000010

PNS Interpretation Adjustments Factor 5

Code	Analyte	Cutoff Value
EBF_FR	AFP	0.860000
IDD_FR	AFP	0.750000
SMK_FR	AFP	1.000000
TWN_FR	AFP	2.110000
EEA_FR	HCG	0.910000
ESA_FR	HCG	0.930000
IDD_FR	HCG	0.940000
SMK_FR	HCG	0.770000
TWN_FR	HCG	2.020000
IDD_FR	HG1	0.900000
SMK_FR	HG1	1.030000
TWN_FR	HG1	2.100000
IDD_FR	INH	0.880000
SMK_FR	INH	1.560000
TWN_FR	INH	2.050000
IDD_FR	NT	1.000000
TWN_FR	NT	1.000000
IDD_FR	PA1	1.020000
SMK_FR	PA1	0.827000
TWN_FR	PA1	1.900000
EAF_FR	UE3	0.925000
EHF_FR	UE3	0.947000
IDD_FR	UE3	0.920000
SMK_FR	UE3	1.000000
TWN_FR	UE3	1.690000

4. **PNS Interpretation Constants:** The value field may be edited.
5. **PNS Interpretation Adjustments Factor:** The cutoff value field may be edited.

Maintain PNS Interpretation Parameters (continued)

FIGURE 4

PNS Interpretation Age Risk 6

Code	Parameter	COEF_NAME	COEF_VAL
T18	AGE_C1	Age Risk Coefficient 1 for T18	7.330000
T18	AGE_C2	Age Risk Coefficient 2 for T18	4.211000
T18	AGE_C3	Age Risk Coefficient 3 for T18	-0.282000
T18	AGE_C4	Age Risk Coefficient 4 for T18	37.230000
T18	AGE_C5	Age Risk Coefficient 5 for T18	
T21	AGE_C1	Age Risk Coefficient 1 for Down Syndrome	7.330000
T21	AGE_C2	Age Risk Coefficient 2for Down Syndrome	4.211000
T21	AGE_C3	Age Risk Coefficient 3for Down Syndrome	-0.282000
T21	AGE_C4	Age Risk Coefficient 4for Down Syndrome	37.230000
T21	AGE_C5	Age Risk Coefficient 5for Down Syndrome	

PNS Interpretation Truncation Limits 7

Code	Parameter	Disease	Lower Limit	Upper Limit
AFP	AFP_TL	SLO	0.4000	2.0000
AFP	AFP_TL	T18	0.3300	2.0000
AFP	AFP_TL	T21	0.4000	3.0000
HCG	HCG_TL	SLO	0.3000	1.5000
HCG	HCG_TL	T18	0.2000	2.5000
HCG	HCG_TL	T21	0.4000	5.0000
HG1	HG1_TL	SLO	1.0000	1.0000
HG1	HG1_TL	T18	0.2000	1.0000
HG1	HG1_TL	T21	0.3000	3.0000
INH	INH_TL	SLO	0.8000	1.2000
INH	INH_TL	T18	0.8000	1.2000
INH	INH_TL	T21	0.3000	5.0000
NT	NT_TL	SLO	1.0000	1.0000
NT	NT_TL	T18	0.8000	2.2000
NT	NT_TL	T21	0.5000	2.5000
PA1	PA1_TL	SLO	1.0000	1.0000
PA1	PA1_TL	T18	0.3000	1.0000
PA1	PA1_TL	T21	0.2000	3.0000
UE3	UE3_TL	SLO	0.3000	1.0000
UE3	UE3_TL	T18	0.4000	1.4000
UE3	UE3_TL	T21	0.4000	2.0000

6. **PNS Interpretation Age Risk:** The Coef_Name and Coef_Val fields may be edited.
7. **PNS Interpretation Truncation Limits:** The Lower Limit and Upper Limit fields may be edited.

Maintain PNS Interpretation Parameters (continued)

FIGURE 5

PNS Interpretation Standard Deviation 8

Code	Parameter	Dating Method	Disease	Mean	Standard Deviation
AFP	NO_SLO	L	SLO	0.000000	0.152700
AFP	NO_SLO	N	SLO	0.000000	0.152700
AFP	NO_SLO	P	SLO	0.000000	0.152700
AFP	NO_SLO	U	SLO	0.000000	0.152700
HCG	NO_SLO	L	SLO	0.000000	0.226000
HCG	NO_SLO	N	SLO	0.000000	0.226000
HCG	NO_SLO	P	SLO	0.000000	0.226000
HCG	NO_SLO	U	SLO	0.000000	0.226000
INH	NO_SLO	L	SLO	0.000000	1.000000
INH	NO_SLO	N	SLO	0.000000	1.000000
INH	NO_SLO	P	SLO	0.000000	1.000000
INH	NO_SLO	U	SLO	0.000000	1.000000
UE3	NO_SLO	L	SLO	0.000000	0.135100
UE3	NO_SLO	N	SLO	0.000000	0.135100
UE3	NO_SLO	P	SLO	0.000000	0.135100
UE3	NO_SLO	U	SLO	0.000000	0.135100
AFP	NO_T18	L	T18	0.000000	0.197600
AFP	NO_T18	N	T18	0.000000	0.197600
AFP	NO_T18	P	T18	0.000000	0.197600
AFP	NO_T18	U	T18	0.000000	0.197600
HCG	NO_T18	L	T18	0.000000	0.241900
HCG	NO_T18	N	T18	0.000000	0.241900
HCG	NO_T18	P	T18	0.000000	0.241900
HCG	NO_T18	U	T18	0.000000	0.241900
INH	NO_T18	L	T18	0.000000	1.000000
INH	NO_T18	N	T18	0.000000	1.000000
INH	NO_T18	P	T18	0.000000	1.000000
INH	NO_T18	U	T18	0.000000	1.000000
UE3	NO_T18	L	T18	0.000000	0.143700
UE3	NO_T18	N	T18	0.000000	0.143700
UE3	NO_T18	P	T18	0.000000	0.143700
UE3	NO_T18	U	T18	0.000000	0.143700
AFP	NO_T21	L	T21	0.000000	0.141700
AFP	NO_T21	N	T21	0.000000	0.139900
AFP	NO_T21	P	T21	0.000000	0.141700
AFP	NO_T21	U	T21	0.000000	0.139900
HCG	NO_T21	L	T21	0.000000	0.227900
HCG	NO_T21	N	T21	0.000000	0.227600
HCG	NO_T21	P	T21	0.000000	0.227900
HCG	NO_T21	U	T21	0.000000	0.227600
INH	NO_T21	L	T21	0.000000	0.207800
INH	NO_T21	N	T21	0.000000	0.207800
INH	NO_T21	P	T21	0.000000	0.207800
INH	NO_T21	U	T21	0.000000	0.207800
UE3	NO_T21	L	T21	0.000000	0.128400
UE3	NO_T21	N	T21	0.000000	0.114200
UE3	NO_T21	P	T21	0.000000	0.128400
UE3	NO_T21	U	T21	0.000000	0.114200
AFP	SLO_PP	L	SLO	-0.142700	0.146500
AFP	SLO_PP	N	SLO	-0.142700	0.146500
AFP	SLO_PP	P	SLO	-0.142700	0.146500
AFP	SLO_PP	U	SLO	-0.142700	0.146500
HCG	SLO_PP	L	SLO	-0.119200	0.315900
HCG	SLO_PP	N	SLO	-0.119200	0.315900
HCG	SLO_PP	P	SLO	-0.119200	0.315900
HCG	SLO_PP	U	SLO	-0.119200	0.315900
INH	SLO_PP	L	SLO	0.000000	1.000000
INH	SLO_PP	N	SLO	0.000000	1.000000
INH	SLO_PP	P	SLO	0.000000	1.000000

8. **PNS Interpretation Standard Deviation:** The Mean and Standard Deviation fields may be edited.

Maintain PNS Interpretation Parameters (continued)

FIGURE 6

PNS Interpretation Correlations 9

Disease	Relationship Type	Selection Method	Selection Criterion	Analyte	Correlated Analyte	Value
SLO	NO_SLO	DM	L	AFP	HCG	0.09500
SLO	NO_SLO	DM	L	AFP	INH	0.00000
SLO	NO_SLO	DM	L	AFP	UE3	0.31400
SLO	NO_SLO	DM	N	AFP	HCG	0.09500
SLO	NO_SLO	DM	N	AFP	INH	0.00000
SLO	NO_SLO	DM	N	AFP	UE3	0.31400
SLO	NO_SLO	DM	P	AFP	HCG	0.09500
SLO	NO_SLO	DM	P	AFP	INH	0.00000
SLO	NO_SLO	DM	P	AFP	UE3	0.31400
SLO	NO_SLO	DM	U	AFP	HCG	0.09500
SLO	NO_SLO	DM	U	AFP	INH	0.00000
SLO	NO_SLO	DM	U	AFP	UE3	0.31400
SLO	SLO_PP	DM	L	AFP	HCG	0.22300
SLO	SLO_PP	DM	L	AFP	INH	0.00000
SLO	SLO_PP	DM	L	AFP	UE3	0.37600
SLO	SLO_PP	DM	N	AFP	HCG	0.22300
SLO	SLO_PP	DM	N	AFP	INH	0.00000
SLO	SLO_PP	DM	N	AFP	UE3	0.37600
SLO	SLO_PP	DM	P	AFP	HCG	0.22300
SLO	SLO_PP	DM	P	AFP	INH	0.00000
SLO	SLO_PP	DM	P	AFP	UE3	0.37600
SLO	SLO_PP	DM	U	AFP	HCG	0.22300
SLO	SLO_PP	DM	U	AFP	INH	0.00000
SLO	SLO_PP	DM	U	AFP	UE3	0.37600
T18	NO_T18	DM	L	AFP	HCG	0.03380
T18	NO_T18	DM	L	AFP	INH	0.00000
T18	NO_T18	DM	L	AFP	UE3	0.23210
T18	NO_T18	DM	N	AFP	HCG	0.03380
T18	NO_T18	DM	N	AFP	INH	0.00000
T18	NO_T18	DM	N	AFP	UE3	0.23210
T18	NO_T18	DM	P	AFP	HCG	0.03380
T18	NO_T18	DM	P	AFP	INH	0.00000
T18	NO_T18	DM	P	AFP	UE3	0.23210
T18	NO_T18	DM	U	AFP	HCG	0.03380
T18	NO_T18	DM	U	AFP	INH	0.00000
T18	NO_T18	DM	U	AFP	UE3	0.23210
T18	T18_PP	DM	L	AFP	HCG	0.03140
T18	T18_PP	DM	L	AFP	INH	0.00000
T18	T18_PP	DM	L	AFP	UE3	0.25010
T18	T18_PP	DM	N	AFP	HCG	0.03140
T18	T18_PP	DM	N	AFP	INH	0.00000
T18	T18_PP	DM	N	AFP	UE3	0.25010
T18	T18_PP	DM	P	AFP	HCG	0.03140
T18	T18_PP	DM	P	AFP	INH	0.00000
T18	T18_PP	DM	P	AFP	UE3	0.25010
T18	T18_PP	DM	U	AFP	HCG	0.03140
T18	T18_PP	DM	U	AFP	INH	0.00000
T18	T18_PP	DM	U	AFP	UE3	0.25010
T21	NO_T21	DM	L	AFP	HCG	0.13360

9. **PNS Interpretation Correlations:** The value field may be edited.

Maintain PNS Interpretation Parameters (continued)

FIGURE 7

PNS Interpretation Parameter Type (10)

Parameter	Parameter Description	Parameter Type
ADJ_IN	Adjustment Intercept	WT_ADJ_INTERCEPT
ADJ_SL	Adjustment Slope	WT_ADJ_SLOPE
AFP_TL	Truncation Limits MoM AFP	TRUNCATION_LIMIT
AGE_C1	Age Risk Coefficitent 1 For Down Syndrome Screening	RISK_COEFFICIENT
AGE_C2	Age Risk Coefficitent 2 For Down Syndrome Screening	RISK_COEFFICIENT
AGE_C3	Age Risk Coefficitent 3 For Down Syndrome Screening	RISK_COEFFICIENT
AGE_C4	Age Risk Coefficitent 4 For Down Syndrome Screening	RISK_COEFFICIENT
AGE_C5	Age Risk Coefficitent 5 For Down Syndrome Screening	RISK_COEFFICIENT
EAF_FR	Asian Factor UE3	RACE_ADJUSTMENT_FACTOR
EBF_FR	Black Factor AFP	RACE_ADJUSTMENT_FACTOR
EEA_FR	Eas Asian Factor HCG	RACE_ADJUSTMENT_FACTOR
EHF_FR	Hispanic Factor UE3	RACE_ADJUSTMENT_FACTOR
ESA_FR	Sotheast Asian Factor HCG	RACE_ADJUSTMENT_FACTOR
HCG_TL	Truncation Limits MoM HCG	TRUNCATION_LIMIT
HG1_TL	Truncation Limits MoM HCG1	TRUNCATION_LIMIT
IDD_FR	Insulin Dependent Diabetic Factor	ADJUSTMENT_FACTOR
INH_TL	Truncation Limits MoM INH	TRUNCATION_LIMIT
MED_C1	Median Coeffiecient 1	MEDIAN_COEFFICIENT
MED_C2	Median Coeffiecient 2	MEDIAN_COEFFICIENT
MED_C3	Median Coeffiecient 3	MEDIAN_COEFFICIENT
MED_IN	Median Intercept	MEDIAN_INTERCEPT
MED_SL	Median Slope	MEDIAN_SLOPE
NO_SLO	Population Not affected by SLOS disease	POPULATION_TYPE
NO_T18	Population Not affected by T18 - Edward Syndrome disease	POPULATION_TYPE
NO_T21	Population Not affected by T21- Down Syndrome disease	POPULATION_TYPE
NT_TL	Truncation Limits MoM NT	TRUNCATION_LIMIT
PA1_TL	Truncation Limits MoM PAPP-A	TRUNCATION_LIMIT
SLO_PP	SLOS affected Population	POPULATION_TYPE
SMK_FR	Smoking Factor	ADJUSTMENT_FACTOR
T18_PP	T18 affected Population	POPULATION_TYPE
T21_PP	T21 Down Syndrome Population	POPULATION_TYPE
TWN_FR	Twin Factor	ADJUSTMENT_FACTOR
UE3_TL	Truncation Limits MoM UE3	TRUNCATION_LIMIT
V_MEAN	Mean	MEAN
V_STDV	Standard Deviation	STANDARD_DEVIATION

10. **PNS Interpretation Parameter Type:** No fields are editable on this screen.

Maintain PNS Interpretation Parameters (continued)

FIGURE 8

11

PNS Interpretation Partial Panel Logic

CVS	Fetus	Panel Code	NTD Logic	T21 Logic	T18 Logic	SLO Logic	T21 RSK CUTOFF	T18 RSK CUTOFF	SLO RSK CUTOFF
N	M	1	0	0	0	0	150	100	250
N	M	2	0	0	0	0	150	100	250
N	M	3	0	0	0	0	150	100	250
N	M	4	0	0	0	0	150	100	250
N	M	5	0	0	0	0	150	100	250
N	M	6	0	0	0	0	150	100	250
N	M	7	0	Y	0	0	150	100	250
N	M	8	0	0	0	0	150	100	250
N	M	9	0	0	0	0	150	100	250
N	M	10	0	0	0	0	150	100	250
N	M	11	Y	Y	0	0	150	100	250
N	M	12	0	0	0	0	150	100	250
N	M	13	Y	Y	0	0	150	100	250
N	M	14	Y	Y	0	0	150	100	250
N	M	15	Y	Y	0	0	150	100	250
N	M	16	0	0	0	0	200	100	250
N	M	17	0	0	0	0	200	100	250
N	M	18	0	0	0	0	200	100	250
N	M	19	0	0	0	0	200	100	250
N	M	20	0	0	0	0	200	100	250
N	M	21	0	0	0	0	200	100	250
N	M	22	0	0	0	0	200	100	250
N	M	23	0	Y	0	0	200	100	250
N	M	24	0	0	0	0	200	100	250
N	M	25	0	0	0	0	200	100	250
N	M	26	0	0	0	0	200	100	250
N	M	27	Y	Y	0	0	200	100	250
N	M	28	0	0	0	0	200	100	250
N	M	29	Y	Y	0	0	200	100	250
N	M	30	Y	Y	0	0	200	100	250
N	M	31	Y	Y	0	0	200	100	250
N	M	32	0	0	0	0	200	100	250
N	M	33	0	0	0	0	200	100	250
N	M	34	0	0	0	0	200	100	250
N	M	35	0	0	0	0	200	100	250
N	M	36	0	0	0	0	200	100	250

11. **PNS Interpretation Partial Panel Logic:** NTD Logic, T21 Logic, T18 Logic, SLO Logic, T21 Rick Cutoff, T18 Risk Cutoff, SLO Risk Cutoff fields may be edited.

Maintain PNS Interpretation Parameters (continued)

FIGURE 9

PNS Interpretation Parameter Disease (12)

Situation Code	Disease Code	Trimester Risk	Mlr Risk Lwr Lmt	Mlr Risk Upr Lmt
I	NTD			
Q	NTD			
S	NTD			
T	NTD			
I	SLO	1.000000	10.000000	10000.000000
Q	SLO	1.000000	10.000000	10000.000000
S	SLO	1.000000	10.000000	10000.000000
T	SLO	1.000000	10.000000	10000.000000
F	T18	3.000000	3.000000	100000.000000
I	T18	3.000000	3.000000	100000.000000
Q	T18	[illegible]	[illegible]	[illegible]

.

12. **PNS Interpretation Parameter Disease:** The Trimester Risk, Mlr Risk Lwr Lmt and Mlr Risk Upr Lmt fields may be edited.

PNS Interpretation Race and Ethnicity Adjustments (13)

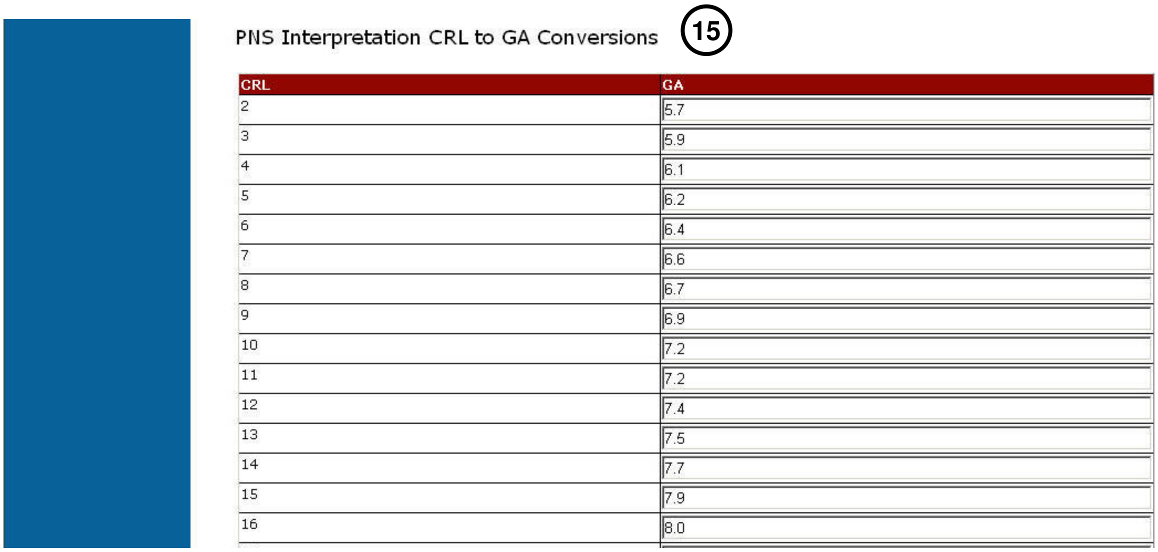
Analyte	Ethnicity	Adjustment	Priority
AFP	WHITE	0.940000	11
AFP	CHINESE	0.910000	4
AFP	FILIPINO	0.931000	9
AFP	MIDDLE EASTERN	0.930000	12
AFP	BLACK	0.857000	1
AFP	JAPANESE	0.910000	2
AFP	VIETNAMESE	0.931000	8
AFP	INDIAN SUBCONT.	1.000000	16
AFP	HISPANIC/LATINA	0.980000	10
AFP	KOREAN	0.890000	3

13. **PNS Interpretation Race and Ethnicity Adjustments:** Adjustment and Priority fields may be edited.

PNS Interpretation 1st Trimester Standard Deviation (14)

Disease	Relationship Type	Selection Method	Selection Criterion	Analyte	Intercept	Slope	Standard Deviation
T18	NO_T18	DM	L	HG1	0.00000	0.00000	0.21270
T18	NO_T18	DM	L	PA1	0.00000	0.00000	0.24950
T18	NO_T18	DM	N	HG1	0.00000	0.00000	0.21270
T18	NO_T18	DM	N	PA1	0.00000	0.00000	0.24950
T18	NO_T18	DM	P	HG1	0.00000	0.00000	0.21270
T18	NO_T18	DM	P	PA1	0.00000	0.00000	0.24950
T18	NO_T18	DM	U	HG1	0.00000	0.00000	0.21270
T18	NO_T18	DM	U	PA1	0.00000	0.00000	0.24950
T18	NO_T18	GW	10	NT	0.00000	0.00000	0.13250
T18	NO_T18	GW	11	NT	0.00000	0.00000	0.13250

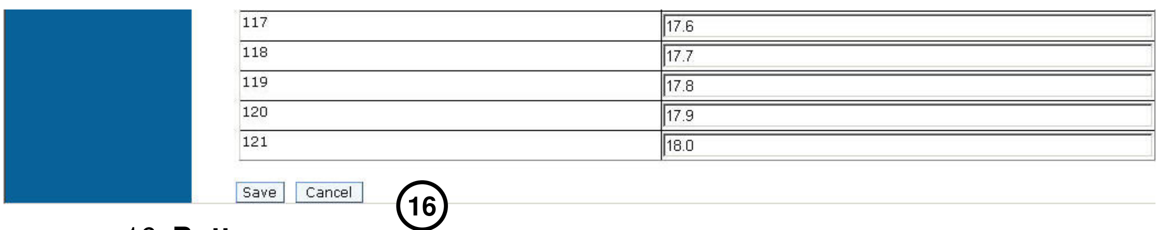
14. **PNS Interpretation 1st Trimester Standard Deviation:** Intercept, Slope and Standard Deviation fields maybe edited.



PNS Interpretation CRL to GA Conversions

CRL	GA
2	5.7
3	5.9
4	6.1
5	6.2
6	6.4
7	6.6
8	6.7
9	6.9
10	7.2
11	7.2
12	7.4
13	7.5
14	7.7
15	7.9
16	8.0

15. **PNS Interpretation CRL to GA Conversions:** GA field maybe edited.



117	17.6
118	17.7
119	17.8
120	17.9
121	18.0

16. **Buttons:**

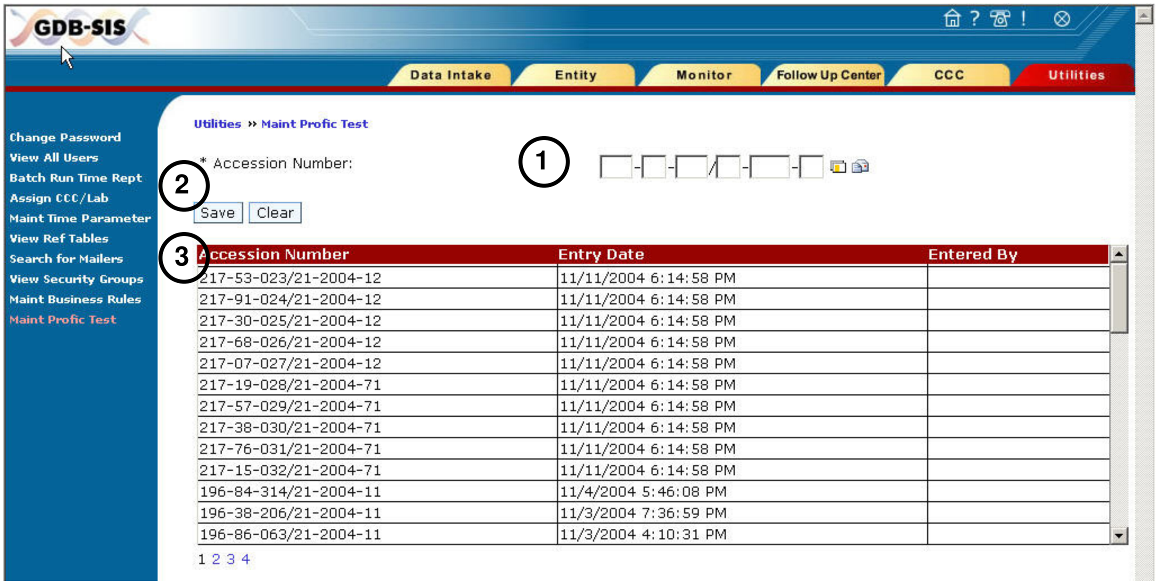
    a. **Save:** Updates any changes made to the interpretation parameters.

    b. **Cancel:** Disregards any changes and directs you to the interpretation parameters.

Maintain Proficiency Test

Utilities >> Maint Profic Test

This screen will allow you to enter accession numbers for specimens received from outside agencies, such as the Center for Disease Control (CDC). These specimens will be tested, but the information associated with the samples is for proficiency testing purposes only. These specimens are identified separately so that they are excluded from GDB case reports or other normal processes.

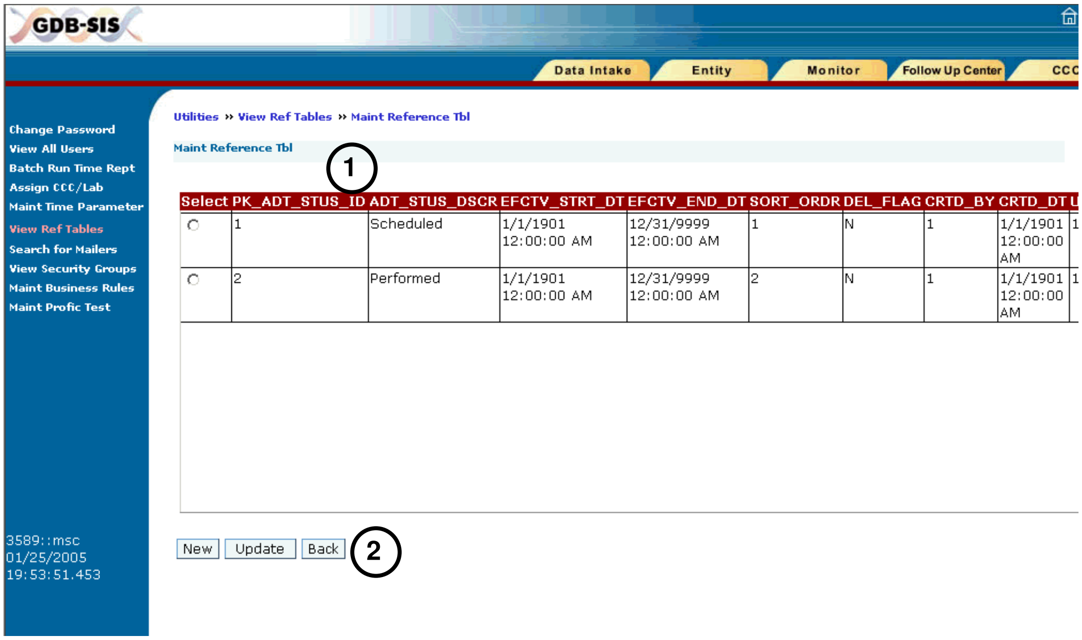


1. **Accession Number** for proficiency tests is a required field.
2. **Buttons**:
   a. The **Save** button will add the Accession Number to the grid below.
   b. The **Clear** button will clear the Accession Number field.
3. The grid displays the Proficiency Test information. First page of Proficiency Test cases (sorted on entry date in descending order) is displayed. Remaining pages can be viewed by clicking the page numbers below the grid.

Maintain Reference Tables

Utilities >> View Ref Tables >> Maint Reference Tbl

This screen allows you to add or update a reference table record.



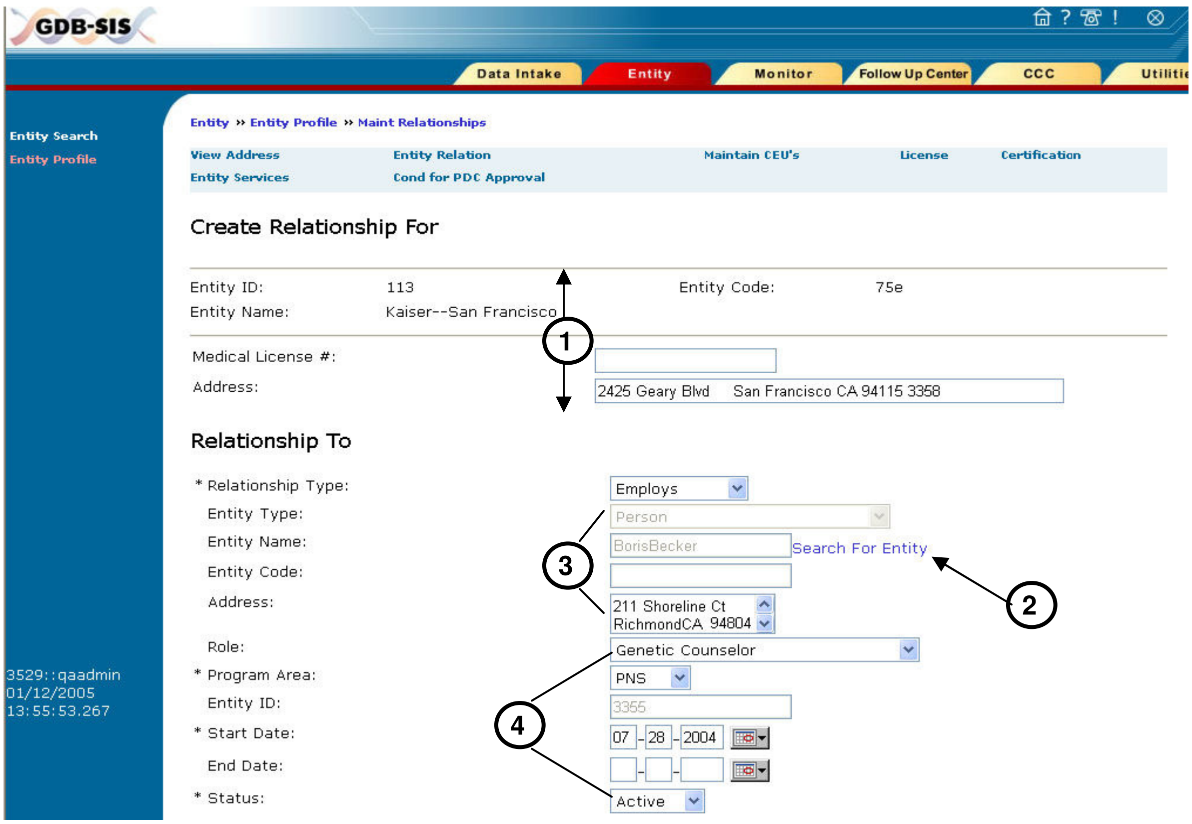
1. The data grid contains a list of reference table records.
2. **Buttons:**
   a. **New** – Add a record to the table.
   b. **Update** – Select a record by clicking the associated radio button and click the Update button to edit an existing record.
   c. **Back** – returns to the previous screen.

Maintain Relationships

Entity >> Entity Profile >> Maint Relationships

The **Maint Relationships** screen is used to create a new relationship between two entities and edit existing relationships. Only users with security settings for NT Practitioners can maintain relationship information for NT Practitioners. Refer to Appendix F – Entity Relationship Matrix to see the types of relationships that can be created between different entity types.

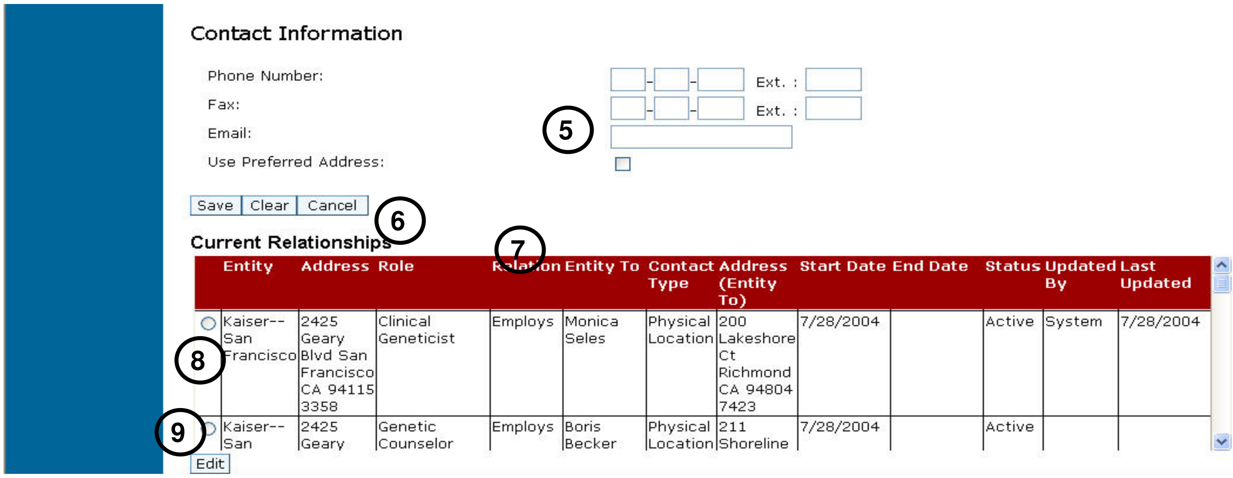
FIGURE 1



1. Information about the selected entity is displayed in a read-only format based on the Entity Profile.
2. You must use the **Search For Entity** link to find the entity to which you are creating a relationship.
3. Information about the entity you select will be displayed in the **Relationship To** section in read-only format.
4. Enter information about the relationship in the fields provided. **Program Area**, **Start Date** and relationship **Status** are required fields. If an **End Date** is not selected it will default to "12/31/9999".

Maintain Relationships (continued)

FIGURE 2



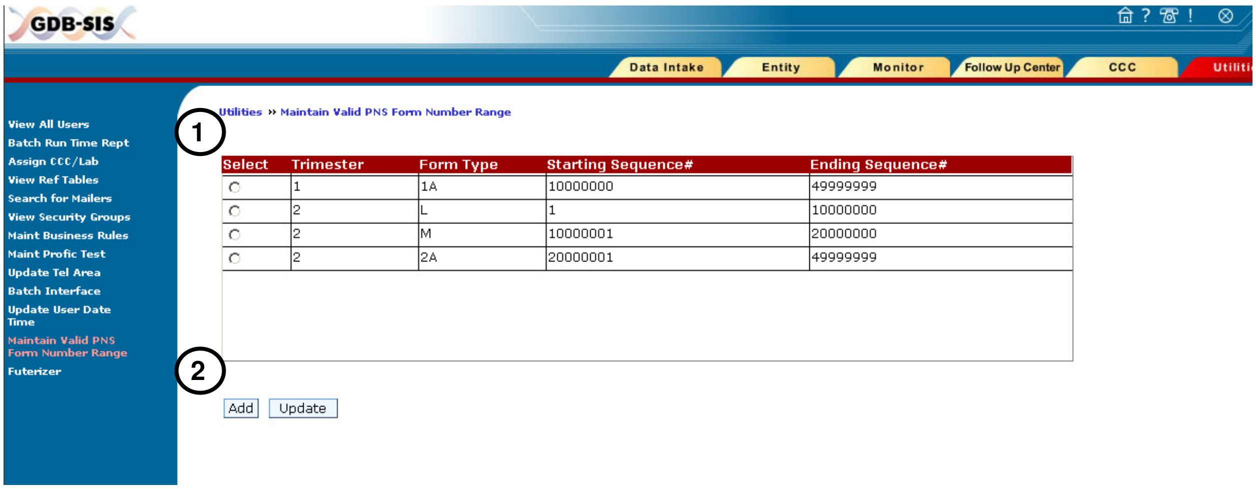
5. Provide **Contact Information** pertinent to the relationship.
6. **Buttons:**
   1. Click the **Save** button to save the relationship information you entered. A row will be added to the Current Relationships grid.
   2. Click the **Clear** button to clear the contents of the fields discarding any changes you made.
   3. Click the **Cancel** button to return to the Entity Relation screen, discarding any changes you made.
7. All relationships for the selected entity are displayed in the **Current Relationships** grid.
8. Click the radio button next to a relationship to select it for editing.
9. Click the **Edit** button to make changes to the selected relationship.

Maintain Valid PNS Form Number Range

Utilities » Maintain Valid PNS Form Number Range

On the **Maintain Valid PNS Form Number Range** screen you can Add or Update the Trimester, Form Type, Starting Sequence number and Ending Sequence number.

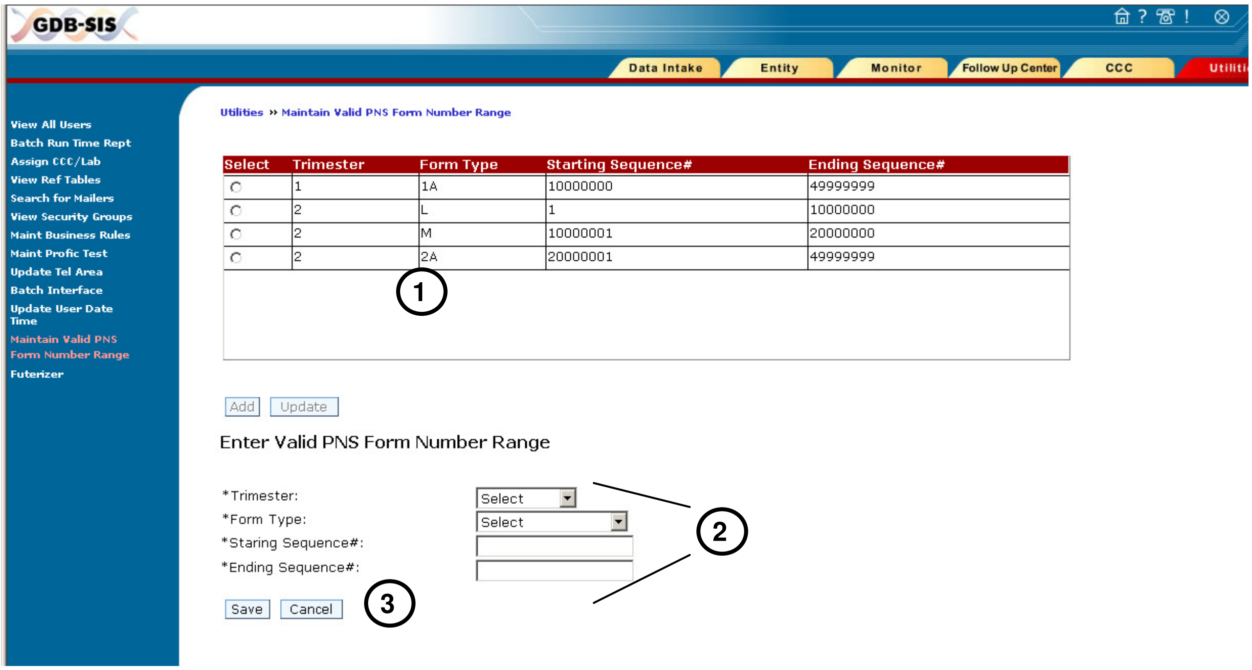
FIGURE 1



1. The trimester column can be selected from the grid.
2. **Buttons**:
   d. The Add button allows user to enter valid PNS form number range.
   e. The Update button allows user for updating the valid PNS form number range.

Maintain Valid PNS Form Number Range (continued)

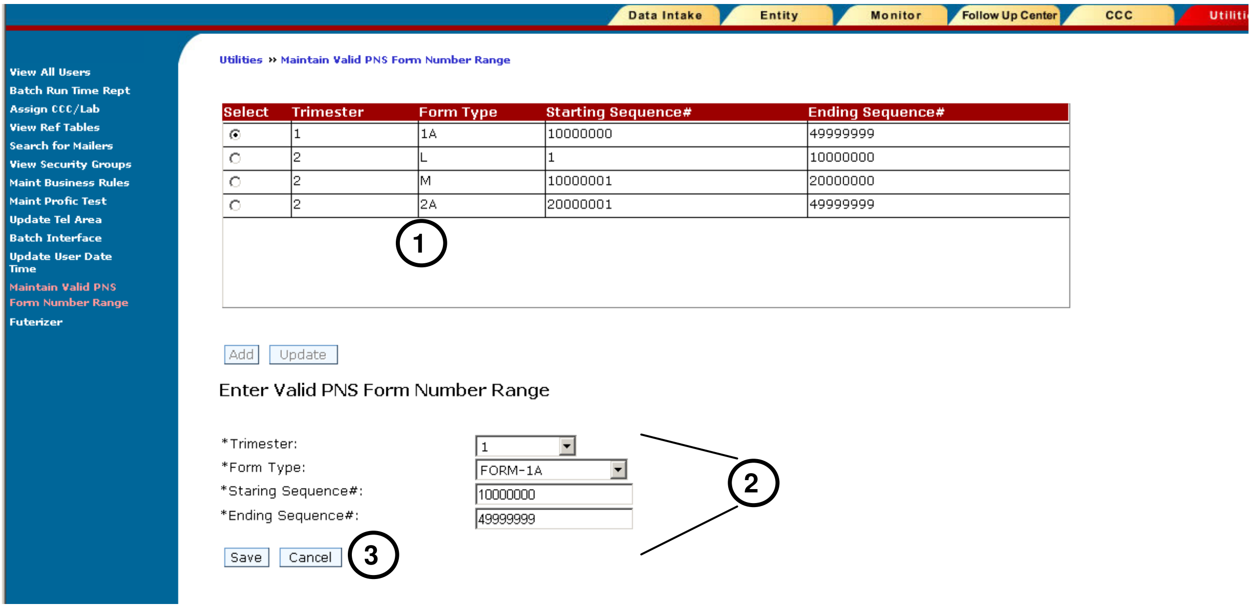
Figure 2



1. Grid that displays the existing form number ranges for each trimester.
2. If user clicks on Add button, Form Number Rage fields will be blank and user need to enter all the required fields. Trimester, Starting Sequence and Ending Sequence are required fields.
3. **Buttons:**
   a. Click the **Save** button to save the new form number range. A new row will be added to the Summary of form number ranges grid (Figure 1).
   b. Click the **Cancel** button to discard any unsaved information and return to the previous screen.

Maintain Valid PNS Form Number Range (continued)

Figure 3



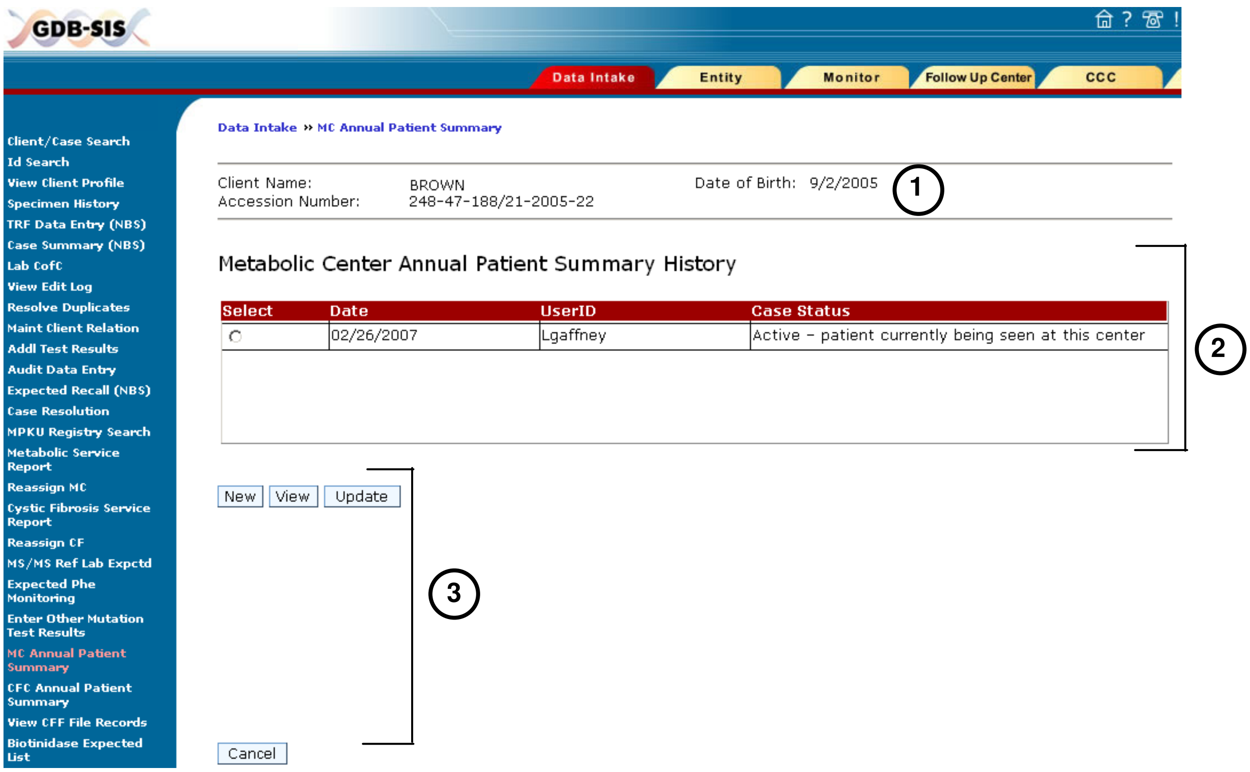
1. Grid that displays the existing form number ranges for each trimester.
2. If user clicks Update button, form number range fields will displays with existing information and allows the user for editing.
3. **Buttons:**
    a. Click the **Save** button to save the updated information.
    b. Click the **Cancel** button to discard any unsaved information and return to the previous screen.

MC Annual Patient Summary

Data Intake >> MC Annual Patient Summary

The MC Annual Patient Summary screen captures the patient summary forms that are completed yearly by Metabolic Centers on each of their patients. These forms capture the general health and any treatments performed on children who have metabolic disorders for the first six years of their lives.

FIGURE 1



1. Displays client and case information in read-only format.
2. **Metabolic Center Annual Patent Summary History:** Lists all MC annual patient summaries that have been completed for the client in the grid. Use the **Select** radio button to indicate the specific annual patient summary to be displayed.
3. **Buttons**:

   a. **New:** Displays a new, blank annual patient summary form for the patient.

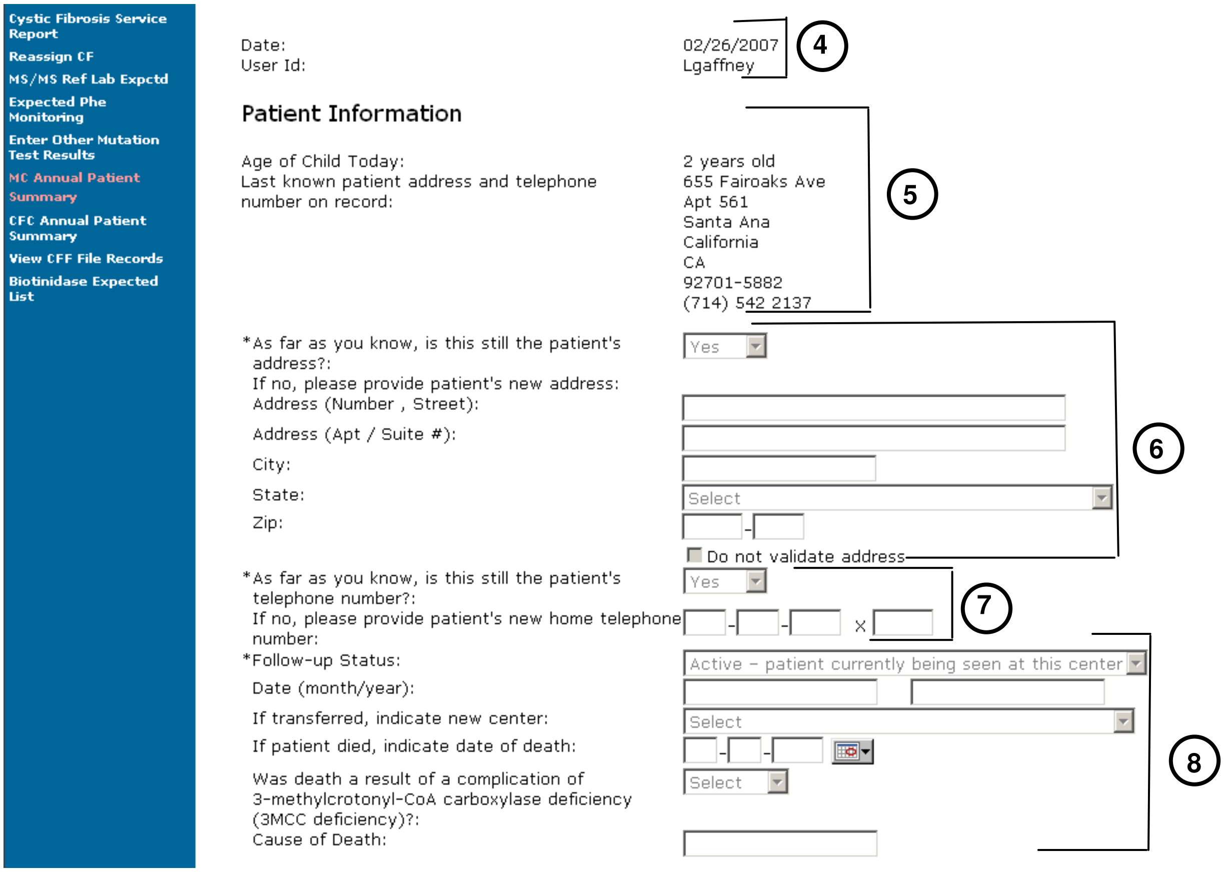
   b. **View:** Displays the annual patient summary selected in the grid in read-only mode.

   c. **Update:** Displays the annual patient summary selected in the grid in update mode.

   d. **Cancel:** Refreshes the screen.

MC Annual Patient Summary (continued)

FIGURE 2



4. Displays the current date and logged in user id.
5. **Patient Information:** Captures patient contact information and high level details regarding the patient's case.
6. Select whether the patient's address is up-to-date. If it is not current, enter the current address, city, state and zip code in the fields that follow. If you prefer that the address not be validated against the post office's addresses for accuracy, check the **Do not validate address** checkbox.
7. Select whether the patient's telephone number is up-to-date. If it is not current, enter the current telephone number in the fields that follow.
8. **Follow-Up Status**: Select the follow-up status for the patient.
   a. If the follow-up status is Transferred, enter the date of the transfer in the **Date (month/year)** fields, and enter the location to which the patient was transferred in the **If Transferred, indicate new center** field.
   b. If the follow-up status is Lost to follow-up, enter the date the patient was lost to follow-up in the **Date (month/year)** fields.

MC Annual Patient Summary (continued)

c. If the follow-up status is Moved out of state, enter the date the patient moved out of California in the **Date (month/year)** fields.

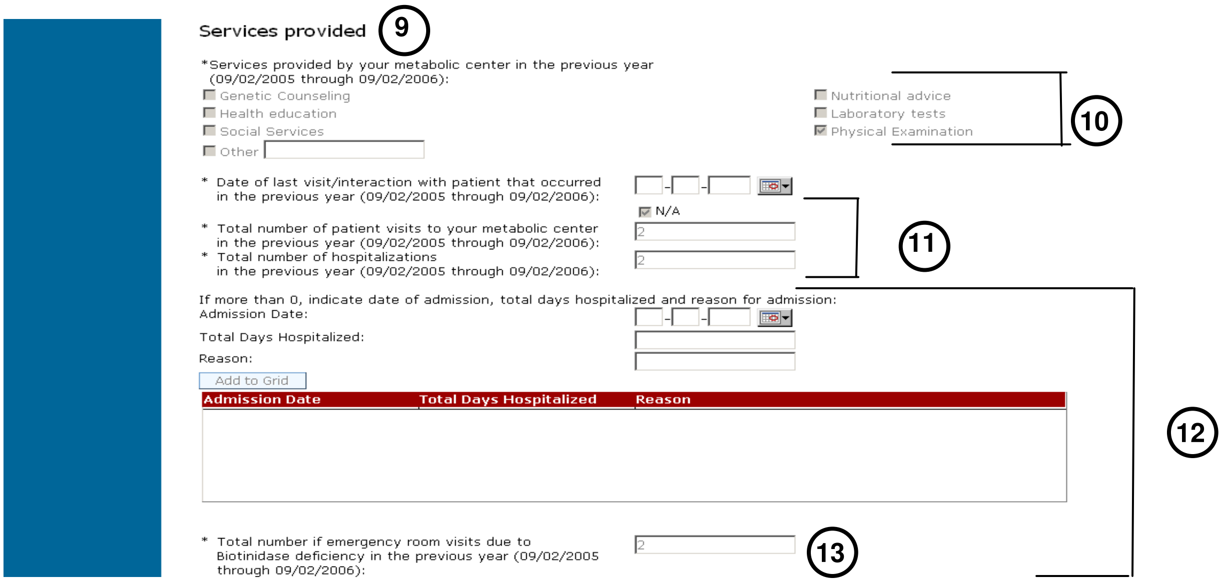
d. If the follow-up status is Refused follow-up, enter the date the patient refused follow-up in the **Date (month/year)** fields.

e. If the follow-up status is Treatment deemed not necessary, enter the date the treatment was deemed unnecessary in the **Date (month/year)** fields.

f. If the follow-up status is Patient died, enter the date death, using the calendar if desired. Indicate whether the death was the result of a complication of the child's metabolic disorder. If not, enter the actual cause of death in the blank box provided.

MC Annual Patient Summary (continued)

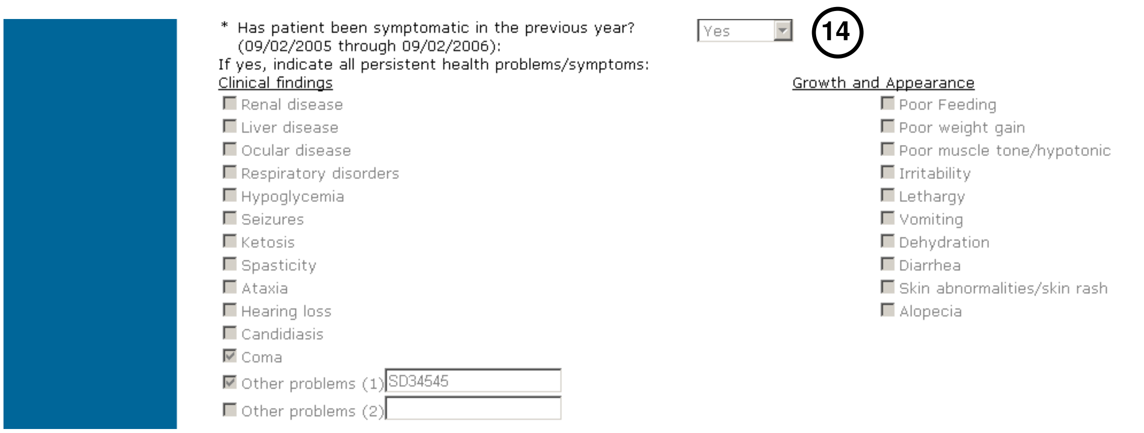
FIGURE 3



9. **Services Provided:** Captures all of the services that were provided to a patient within a specified time frame.
10. Check the services that were provided to the patient in the specified time frame. If services other than those listed on the screen were provided, check the **Other** checkbox, and specify the details of the service in the blank box that follows.
11. Determine when the last interaction with the patient occurred.
    a. If there was at least one interaction within the specified time frame, enter the date that the most recent of interaction with the patient occurred, as well as the total number of visits to the center in the specified time frame. If desired, use the calendar icon to fill in dates.
    b. If there were no interactions with the patient within the specified time frame, check **N/A**.
12. Enter the total number of times the patient was hospitalized within the specified time frame. If the patient was hospitalized at least once within the specified time frame, enter the details of each stay in the fields that follow. For each stay:
    a. Enter the date the patient was admitted. If desired, use the calendar icon.
    b. Enter the total number of days the patient was hospitalized
    c. Enter the **Reason** for the hospitalization.
    d. Click the **Add to Grid** button. This will add the details of the stay to the grid below.
13. Enter the number of times the patient visited the emergency room for the metabolic disorder specified within the specified time frame.

MC Annual Patient Summary (continued)

FIGURE 4



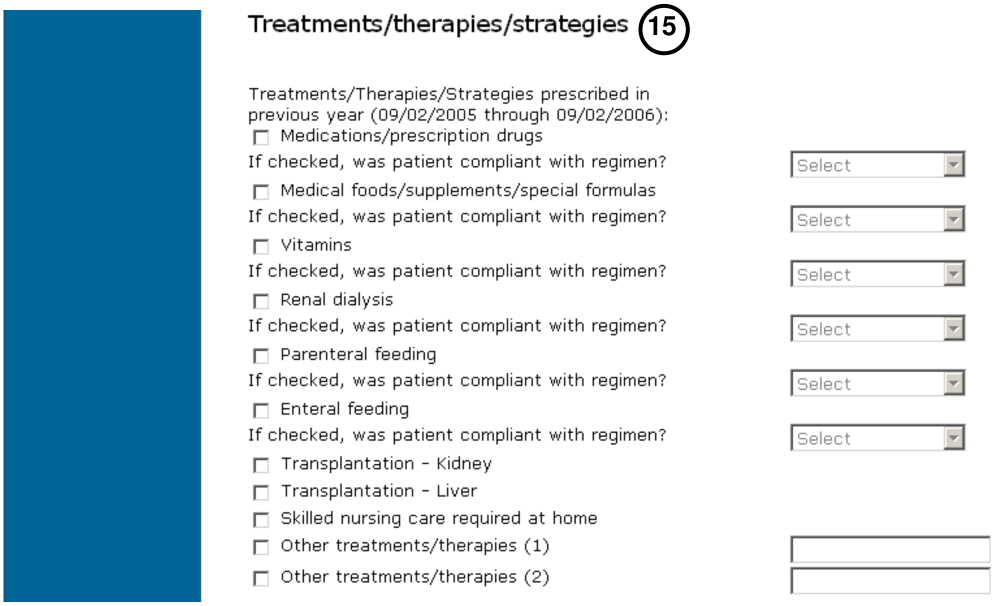
14. Select from dropdown box whether the patient has been symptomatic in the previous year. If the patient has been symptomatic, indicate persistent health problems as follows:

    a. Check the **Clinical Findings** diagnosed for the patient. If findings other than those listed on the screen were identified, check the first available **Other problems** checkbox, and specify the finding in the blank box that follows.

    b. Check the **Growth and Appearance** findings diagnosed for the patient.

MC Annual Patient Summary (continued)

FIGURE 5

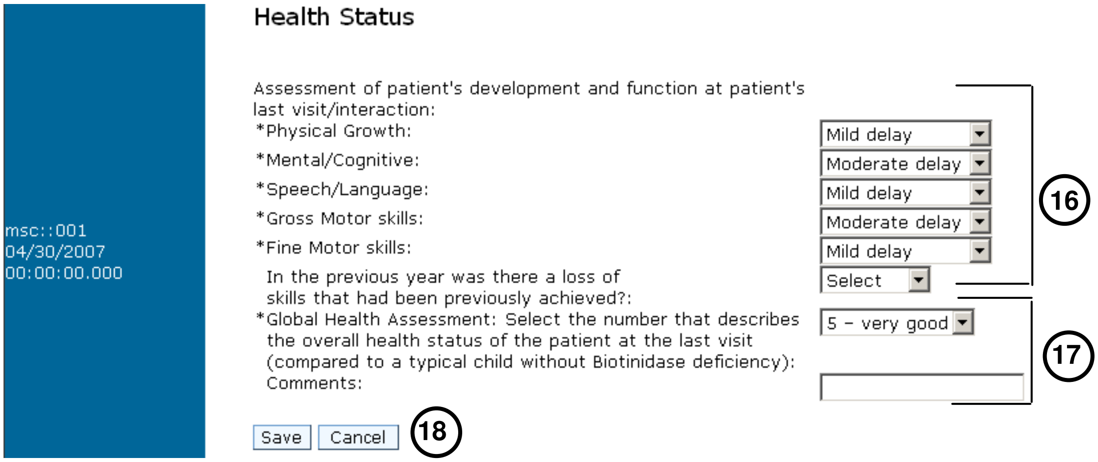


15. Check all treatments that were prescribed to the patient in the specified time frames. If treatments other than those listed on the screen were performed, check the first available **Other treatments/therapies** checkbox, and specify the type of therapy in the blank box that follows.

    a. For each treatment, select whether the patient was compliant with the regimen.

MC Annual Patient Summary (continued)

FIGURE 6



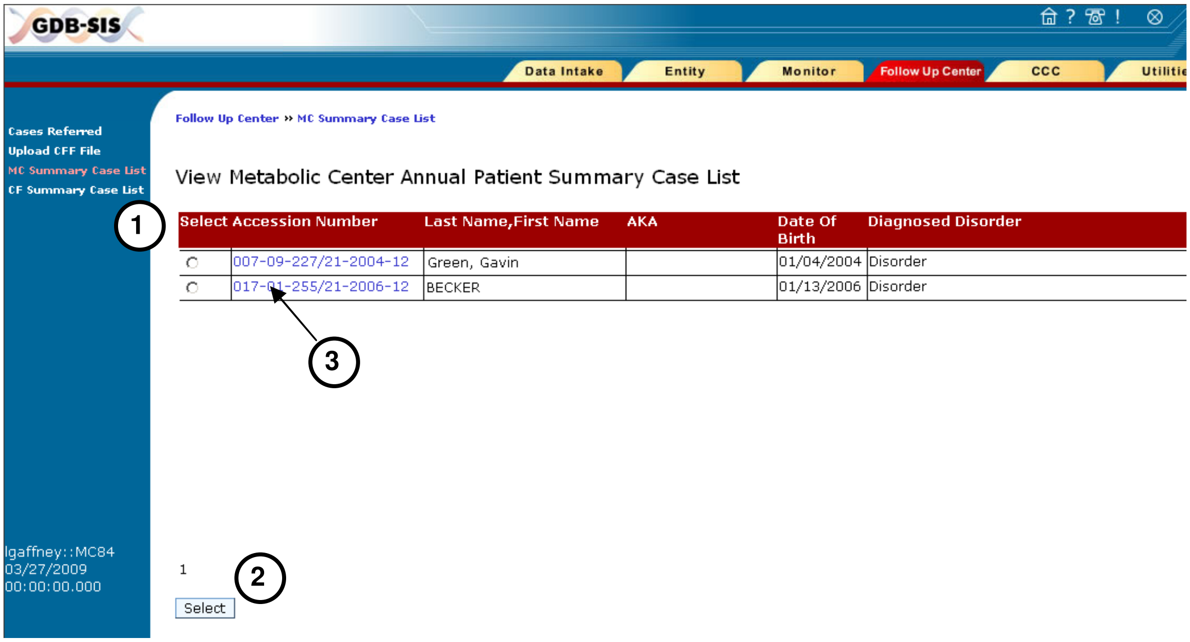
16. **Health Status:** Captures the patient's overall health within the specified time frame. For the specified time frame:
    a. Select the appropriate assessment of the child's **Physical Growth**.
    b. Select the appropriate assessment of the child's **Mental/Cognitive** skills.
    c. Select the appropriate assessment of the child's **Speech/Language** skills.
    d. Select the appropriate assessment of the child's **Gross Motor skills**.
    e. Select the appropriate assessment of the child's **Fine Motor skills**.
    f. Select whether there has been any loss of skills in the previous year.
17. Select the overall health status of the patient at the last visit, by comparing the patient's health against a child who does not have the metabolic disorder. Enter any **Comments.**
18. **Buttons:**
    a. **Save:** If any errors are present on the form, they are displayed in red on the screen, and the information will not save until they are corrected. If no errors are present, the detailed form is closed, and the new or updated MSR appears in the **Metabolic Center Annual Patent Summary History** grid that is displayed.
    b. **Cancel:** Restores the screen with data that existed on the screen after the Save button was last clicked.

MC Annual Patient Summary Case List

Follow Up Center >> MC Annual Summary Case List

The **MC Annual Patient Summary Case List** screen displays all clients who require an annual patient summary from a metabolic center. The MC Annual Patient Summary is due annually, during the month after a child's birthday.

FIGURE 1



1. **View Metabolic Center Annual Summary Case List:** Lists all clients who satisfy the following conditions:
   a. The client's case belongs to the user's metabolic center
   b. The client's case is resolved as "Resolved Disorder" on the client's most current MSR
   c. The client's case is active (i.e. The patient has no previous annual reports OR the Follow up Status on the patient's most current annual report is Active or Transferred)
   d. The child is within the first six years of his/her life
   e. An annual patient summary has not been filed for the patient at that age
   f. The case/client is not already listed in the grid
   g. The patient is alive

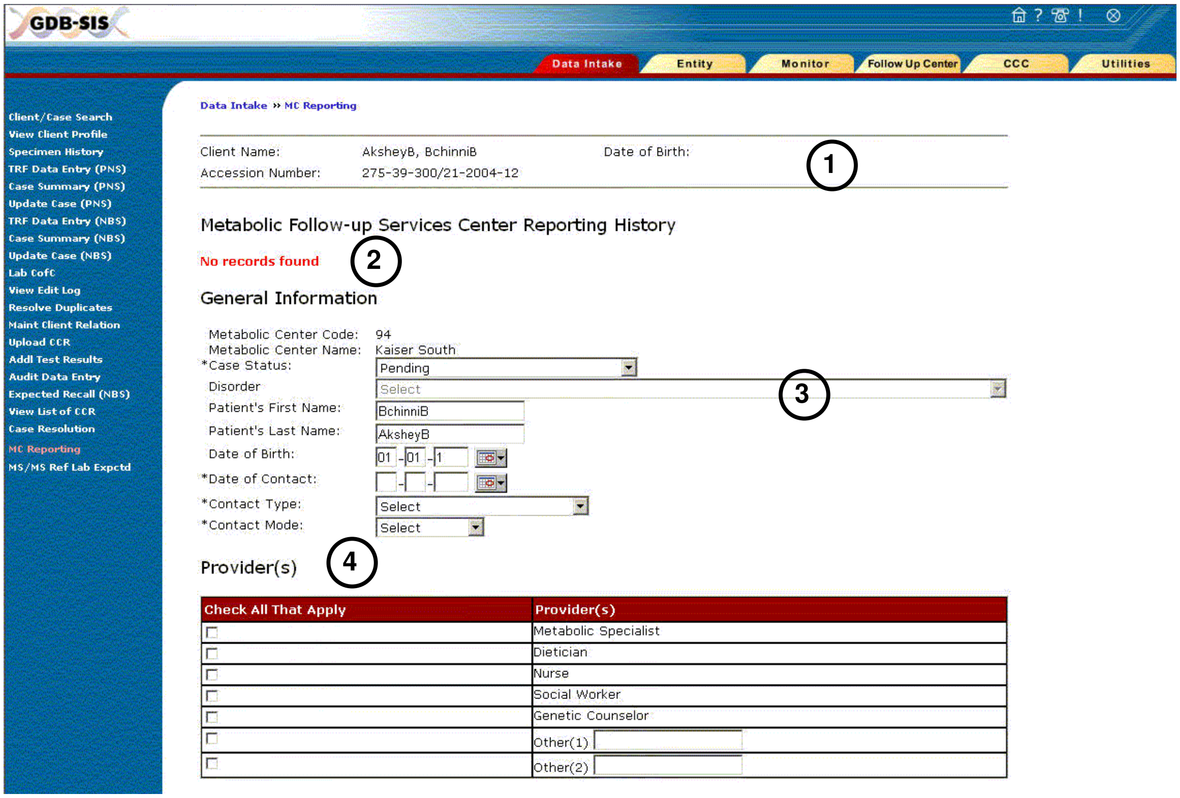
   The cases are removed from the list after an annual patient summary has been entered for the patient for that age.
2. **Buttons:**
   a. **Select:** Navigates to the MC Annual Patient Summary screen where it displays a list of annual patient summaries completed for the patient selected in the grid.
3. Click the appropriate **Accession Number** hyperlink on the grid to view the **Case Summary** screen for the case.

MC (Metabolic Center) Reporting

Data Intake >> MC Reporting

This screen is used to identify the metabolic follow up services provided for a client at a metabolic center. There are multiple ways to access this screen including clicking MC Reporting on the 2nd level link of the Case Summary (NBS) screen.

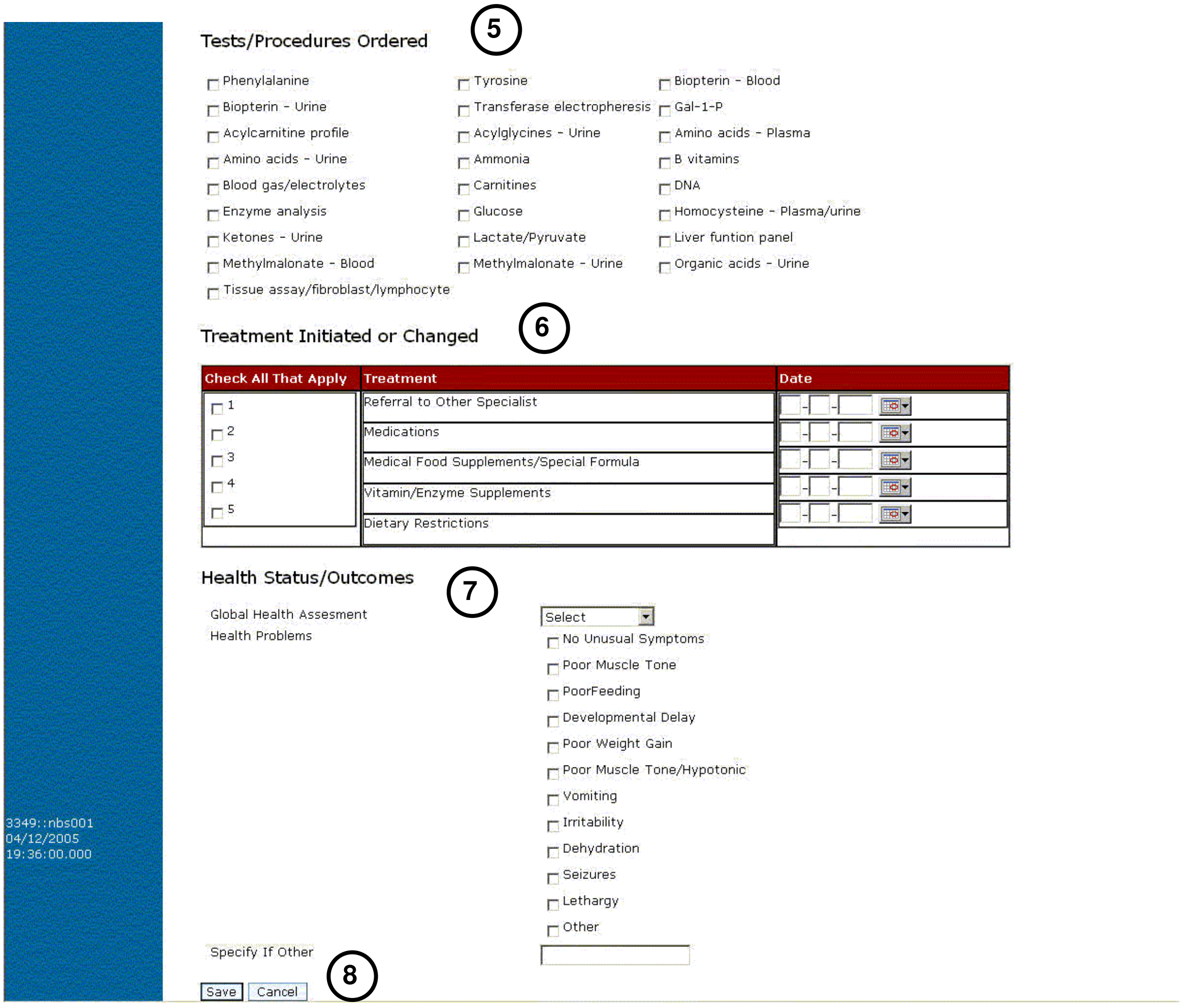
FIGURE 1



1. Client information is displayed in a read-only format, based on the client profile.
2. Records are displayed in the **Metabolic Follow-up Services Center Reporting History** if there are previous service entries for the client record.
3. **Case Status**, **Date of Contact**, **Contact Type** and **Contact Mode** are required fields.
4. **Provider(s)** grid displays all types of specialists that provide patient services. Identify the provider(s) for this case by clicking the checkbox next to the provider's record in the **Check All That Apply** column.

MC (Metabolic Center) Reporting (continued)

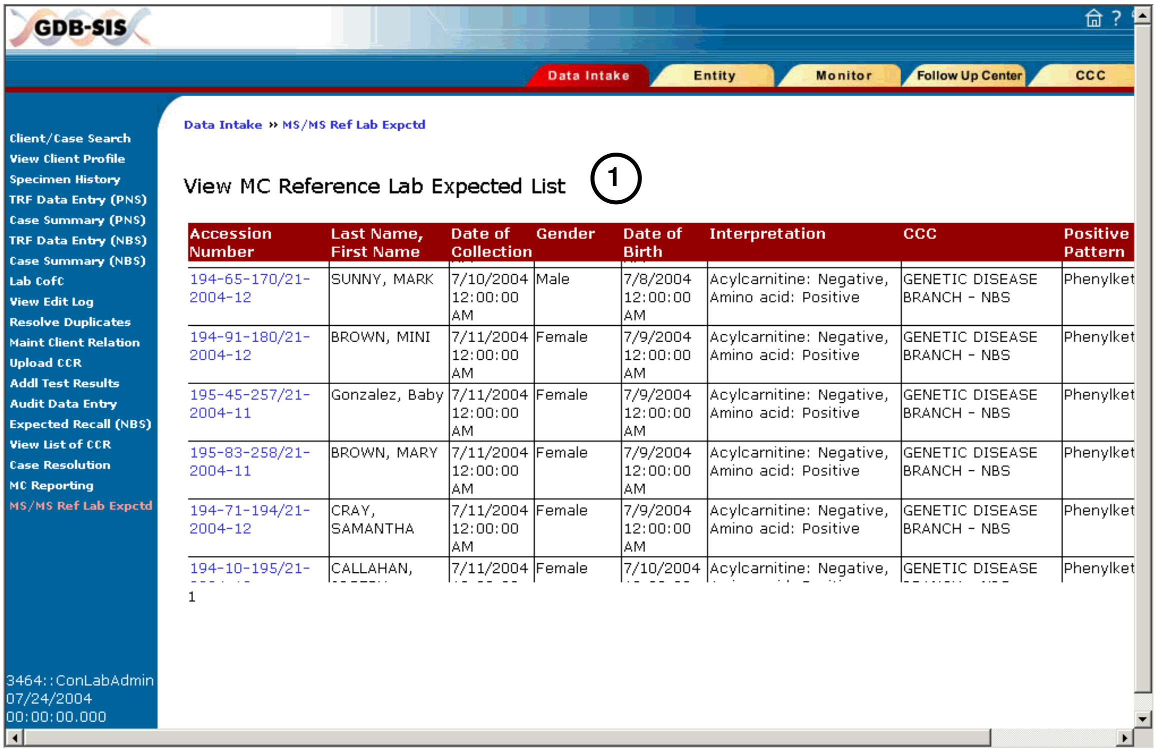
FIGURE 2



5. **Tests/Procedures Ordered** section displays all types of tests that may be ordered for a patient. Identify the tests or procedures for this case by clicking the checkbox next to the name of the test or procedure.
6. **Treatment Initiated or Changed** grid displays all types of treatments that may be prescribed for a patient. Identify the treatment(s) for this case by clicking the checkbox next to the treatment name in the **Check All That Apply** column. Enter the date each prescribed treatment was initiated or changed in the **Date** column.
7. **Health Status/Outcomes** section displays all potential outcomes for a patient. Select the **Global Health Assessment** from the dropdown. Identify the detailed health status or outcome for this case by clicking the checkbox next to the name of the health status or outcome.
8. Click the **Save** button to save the changes. Click the **Cancel** button to cancel your actions without saving.

MC Reference Lab Expected List

This screen lists out all cases with a positive MS/MS disorder pattern. All the cases shown in the list will remain n until the CCC has resolved the case.



The **View MC Reference Lab Expected List** data grid displays all of the cases with a positive MS/MS disorder pattern.

Merge Entities

Entity >> Entity Profile >> Merge Entities

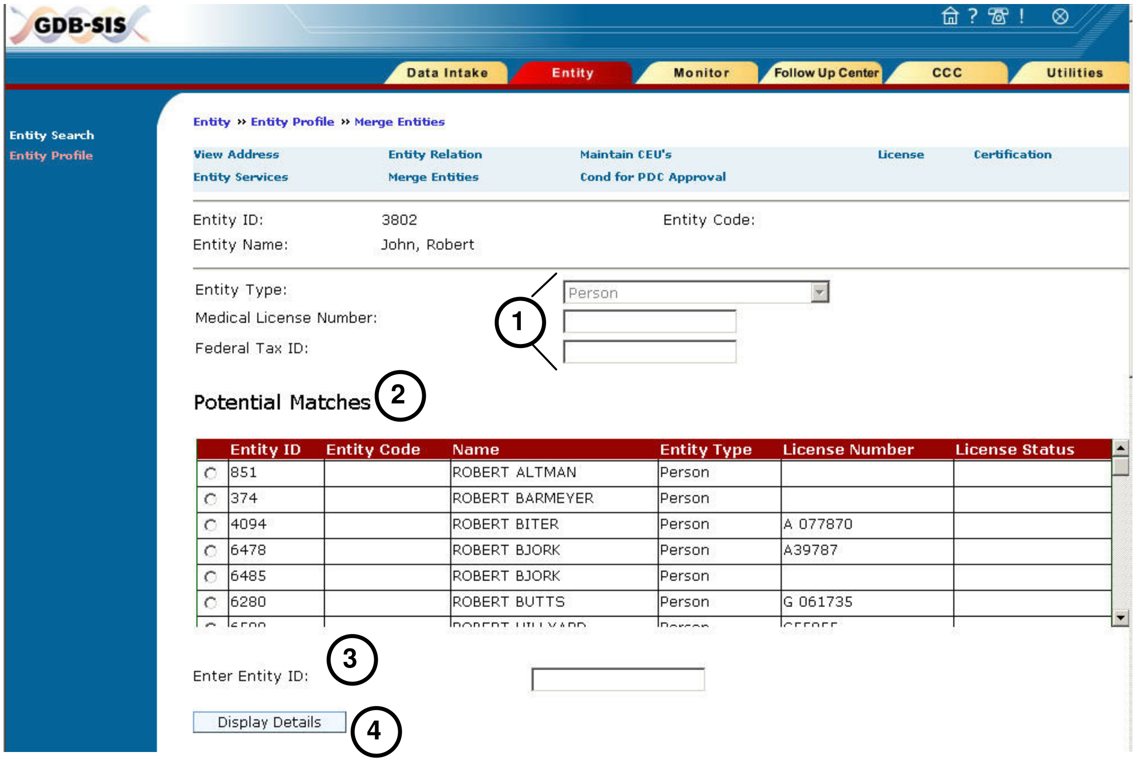
This screen allows you to view potential matches for a provider that does not match an existing record in SIS (i.e. one time providers or not currently active providers) and allows you to merge the entities if appropriate. Potential matches are active providers identified based on the license number, address, and name. Although this screen is used primarily for one-time providers, you are able to merge any type of entity as necessary.

You can access this screen from one of two places: 1) from the Entity Search screen when you have selected an entity record, and you click the Find Potential Match button, or 2) from the Entity Profile screen when you click the Merge Entities link.

When merging entities, the one time provider data is merged to the potential match entity. The potential match record will be updated and the one time provider record will be inactivated.

Merge Entities (continued)

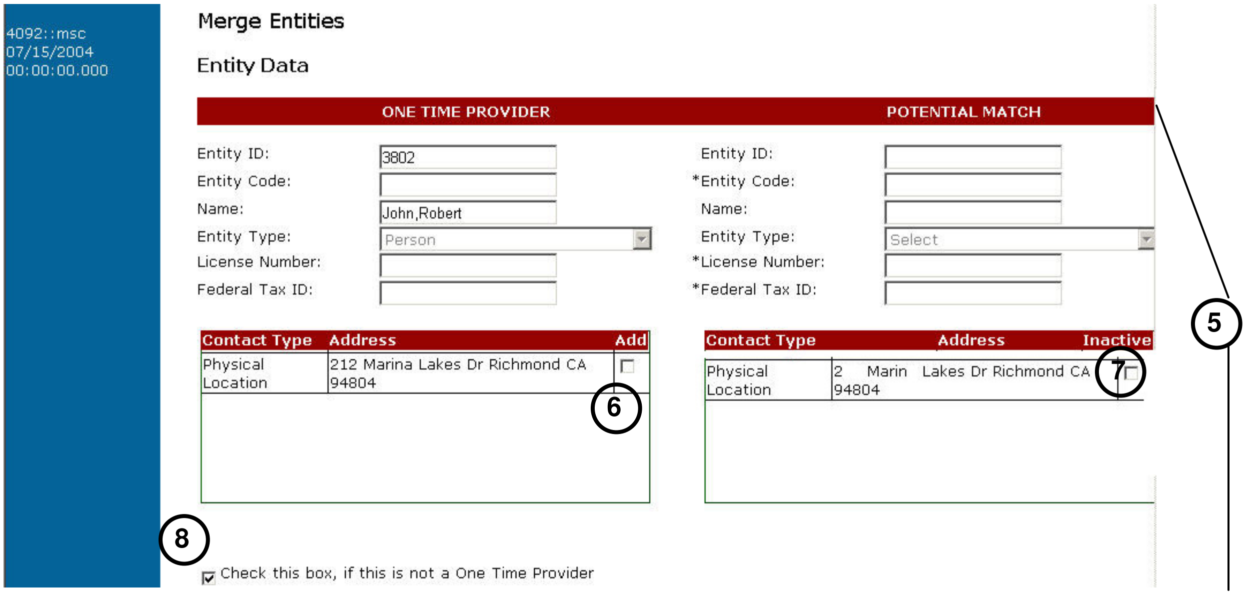
FIGURE 1



1. The one time provider’s basic information is pre-populated based on the data in the previous screen.
2. **Potential Matches** grid will be automatically loaded with any potential matches for the one time provider. To compare entity data with the one time provider’s, check the box for the selected row and click the **Display Details** button.
3. Alternatively, if the potential matches grid does not find the entity you want to merge you can enter the entity’s ID in the **Enter Entity ID** field and click the **Display Details** button.
4. **Display Details** button will populate the Merge Entity fields (see 5) allowing you to compare entity data using either an entity selected from the **Potential Matches** grid or from an Entity ID you entered.

Merge Entities (continued)

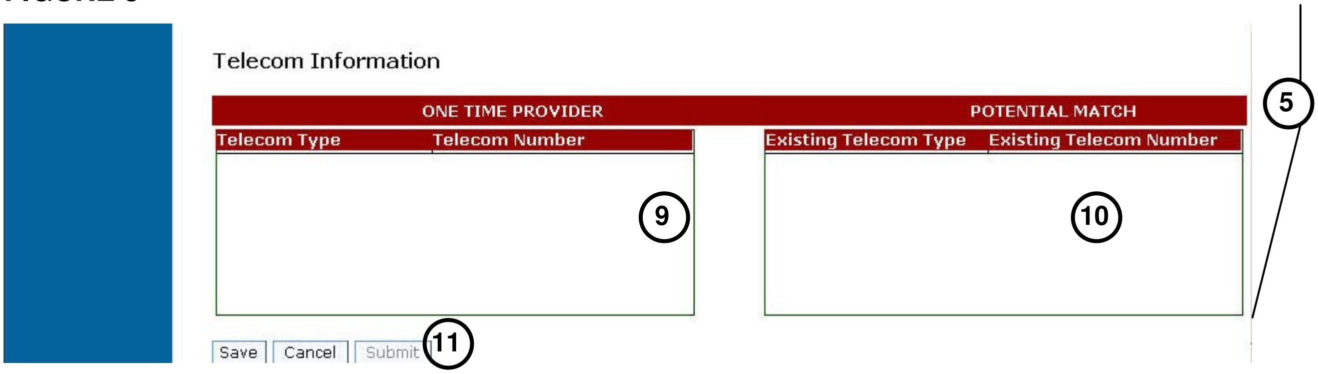
FIGURE 2



5. **Entity Data** for the one time provider and potential match are displayed for comparison after the **Display Details** button is clicked.
6. You may check the **Add** box to add the one time provider's address information to the potential match's information. Checking the **Add** box will also add the one time provider's telecom information to the potential match's information.
7. You may check the **Inactive** box to inactivate the potential match's current address information. Checking the **Inactive** box will also inactivate the potential match's telecom information.
8. **Check this box, if this is not a One Time Provider** is used to indicate that the one time provider should be identified in SIS as a regular, active provider. When checked, the one time match and potential match fields will no longer be editable. Every time the checkbox is changed, the record must be submitted to the database to save the changes. Clicking the Submit button at the bottom of the screen performs this action.

Merge Entities (continued)

FIGURE 3



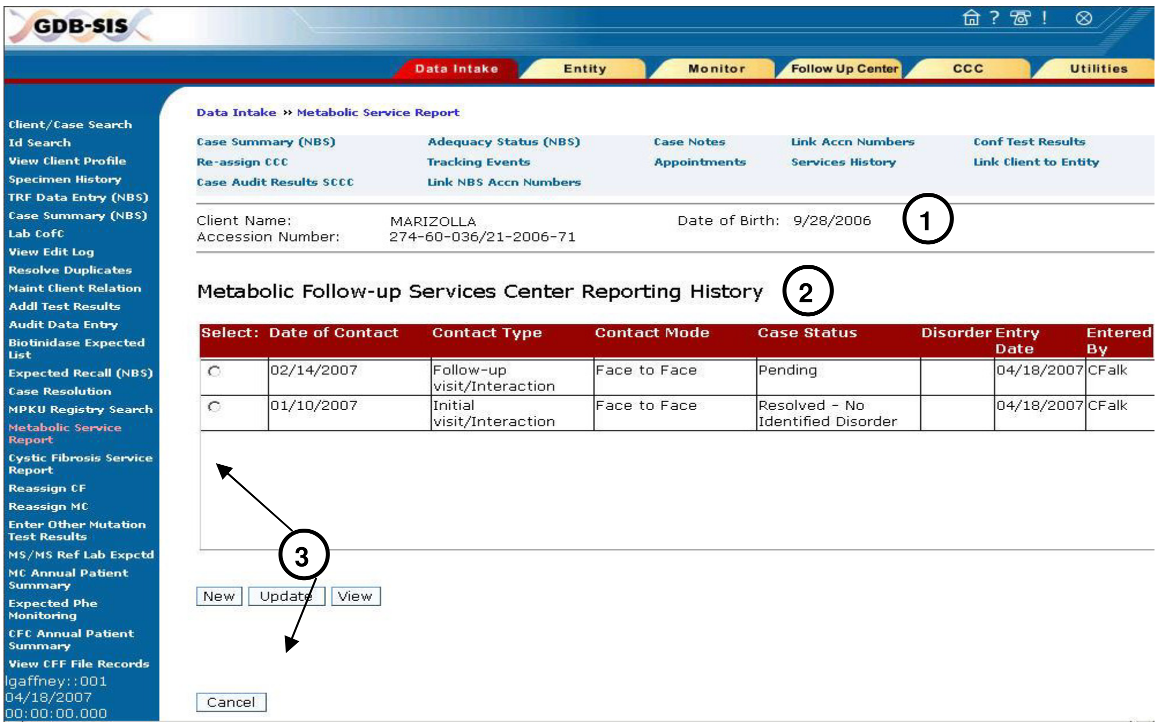
9. If the **Add** box above is checked (see 6), the one-time provider's telecom information will be added to the potential match's telecom information.
10. If the **Inactive** box above is checked (see 7), the potential match's telecom information will be inactivated.
11. **Buttons:**
    a. **Save** button will merge the one time provider data to the potential match entity. The potential match record will be updated and the one time provider record will be inactivated. To check the status of the one time provider after the merge use the Entity Search screen to search for the one time provider and navigate to the View Entity Profile screen.
    b. **Cancel** button will cancel an unsaved merge function and direct you to the Entity Search screen.
    c. **Submit** button must be clicked after the **Check this box, if this is not a One Time Provider** checkbox is changed. The **Submit** button will allow the change to the checkbox to be saved to the database.

Metabolic Services Reporting Form

Data Intake >> Metabolic Service Report

The Metabolic Service Report screen is used to capture services provided at the Metabolic Center up until the point at which the child is diagnosed. All further follow-up will then be captured in the Annual Patient Summary screen. The user can navigate to this screen from the Case Summary or the Cases Referred screen.

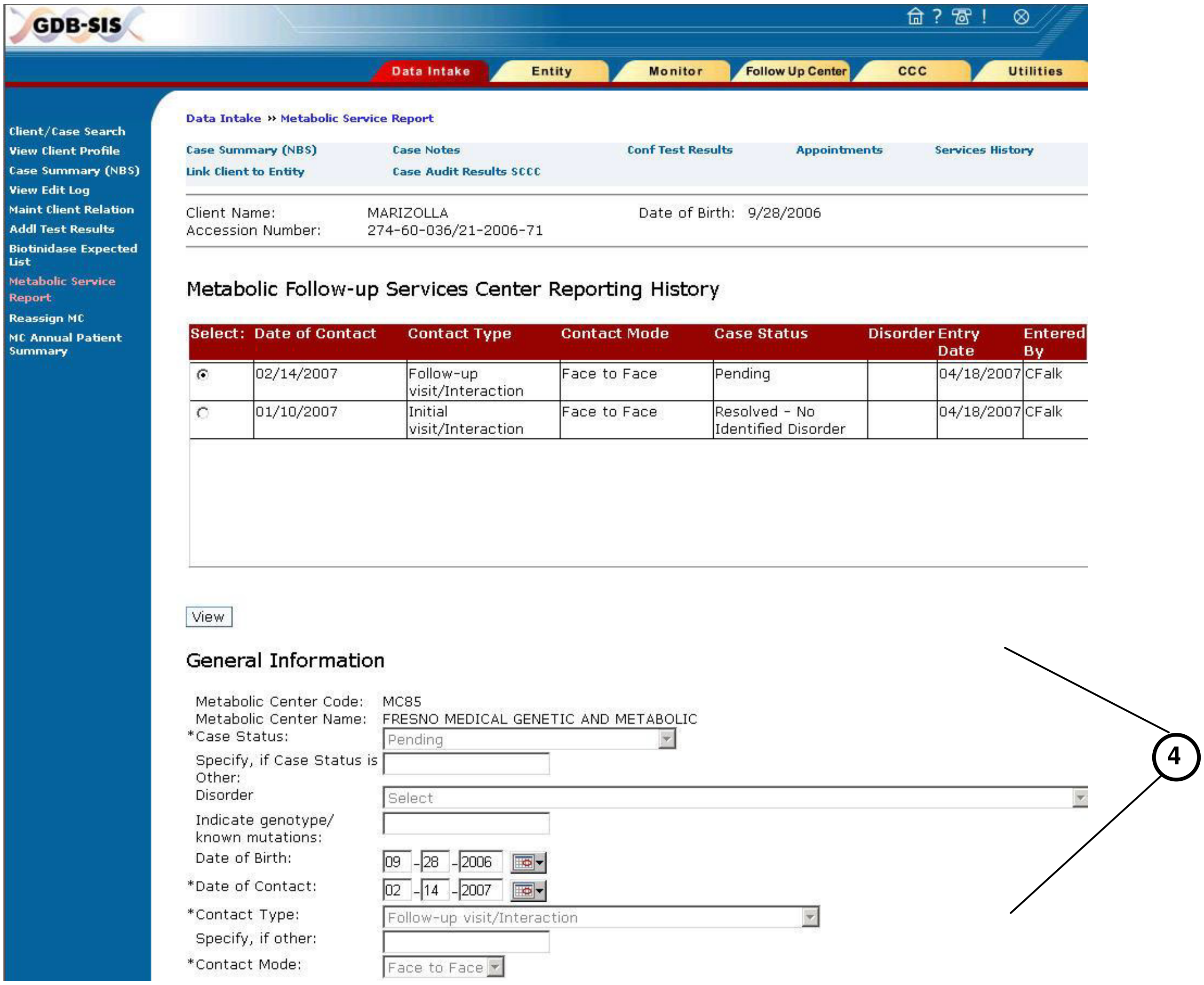
FIGURE 1



1. Client information is displayed in a read-only format, based on the client profile.
2. Records are displayed in the **Metabolic Follow-Up Services Center Reporting History** if there are previous service entries for the client record. The screen above reflects what the screen looks like before any selection of radio buttons is made for the cases.
3. Select a case by clicking the radio button and then selecting **New, Update,** or **View** buttons:
   - a. **New:** Creates a new blank reporting form.
   - b. **Update:** View the details of an already entered form which can be modified. This action is only accessible to security groups that have update access.
   - c. **View:** View the details of an already entered form. This action is only accessible to security groups that have "read" access.
   - d. **Cancel:** Cancels the current operation without saving.

Metabolic Services Reporting Form (continued)

FIGURE 2



4. **General Information: Case Status, Date of Contact, Contact Type** and **Contact Mode** are required fields. All required fields are denoted by the (*).

Metabolic Services Reporting Form (continued)

FIGURE 3

Provider(s) 5

Check All That Apply	Provider(s)
☑	Metabolic Specialist
☐	Medical Geneticist
☐	Dietician
☐	Nurse
☐	Social Worker
☐	Genetic Counselor
☐	Other(1)
☐	Other(2)

Service(s) Provided 6

Check All That Apply	Service(s)
☑	Genetic Counseling
☐	Nutrition Advice
☐	Laboratory Tests
☐	Social Services
☐	Physical Examination
☐	Health Education
☐	Other

Tests/Procedures Ordered 7

☐ Acylcarnitine Profile - Plasma/serum	☐ Bone maturity study	☐ Liver funtion panel
☐ Acylcarnitine Profile - Urine	☐ Carnitines	☐ Methylmalonate - Plasma/serum
☐ Amino acids - Plasma/serum	☐ DNA	☐ Methylmalonate - Urine
☐ Amino acids - Urine	☐ Electrolytes	☐ Organic acids - Urine
☐ Ammonia	☐ Enzyme analysis	☐ Organic acids - Plasma/serum
☐ B vitamins	☐ Gal-1-P	☐ Phenylalanine
☐ Biopterin - Plasma/serum	☐ Glucose	☐ Pyruvate
☐ Biopterin - Urine	☐ Homocysteine - Plasma/serum	☐ Tissue assay/fibroblast/lymphocyte
☐ Biotinidase Assay - Serum	☐ Ketones - Urine	☐ Transferase electropheresis
☐ Blood gas	☐ Lactate	☐ Tyrosine

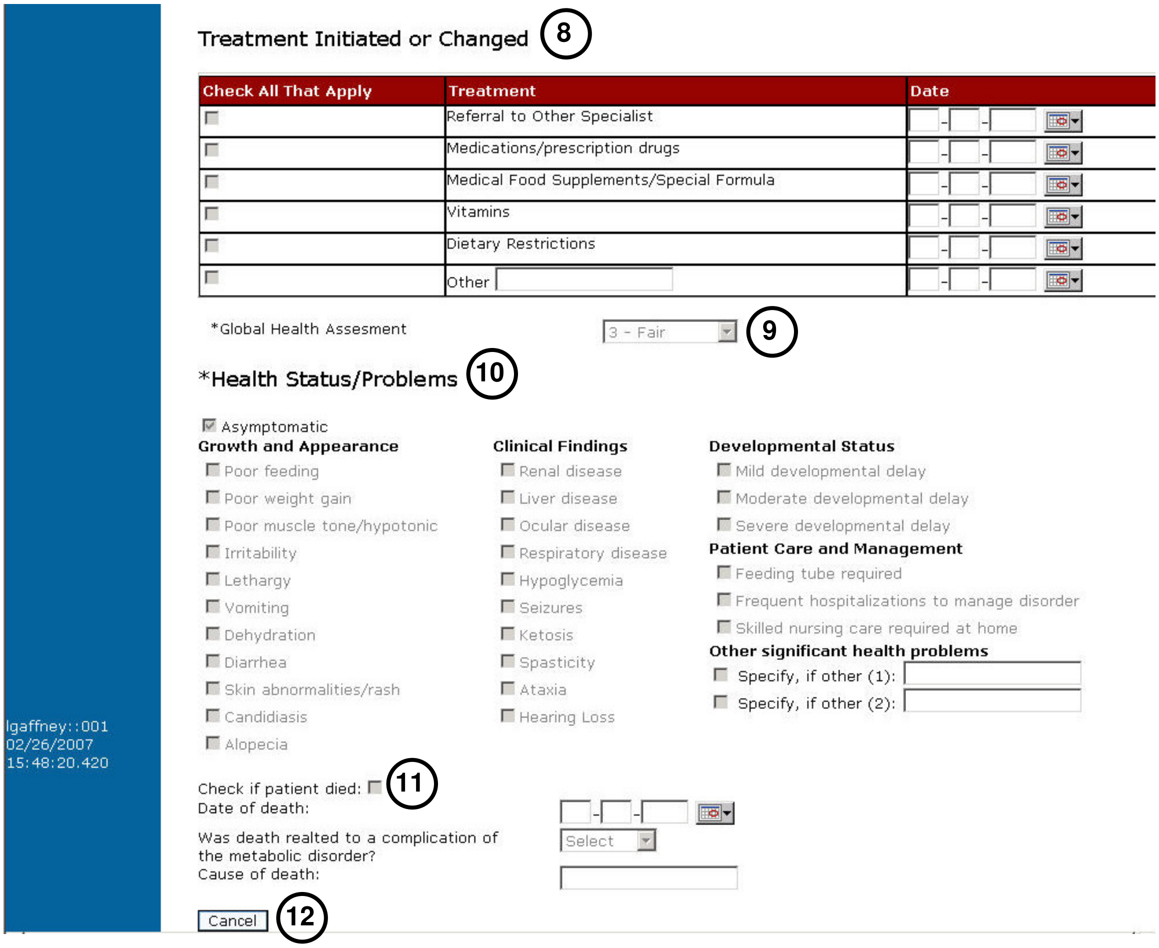
5. **Provider(s)** grid displays types of specialists that provide patient services. Identify the providers for this case by checking the checkbox next to the provider's record in the **Check All That Apply** column.

6. **Service(s) Provided** grid displays types of services that are available to a patient. Identify requested services by checking the checkboxes next to the Service(s) provided in the **Check All That Apply** column.

7. **Tests/Procedures Ordered** section displays types of tests that may be ordered for a patient. Identify the tests or procedures for this case by checking the checkbox next to the name of the test or procedure.

Metabolic Services Reporting Form (continued)

FIGURE 4



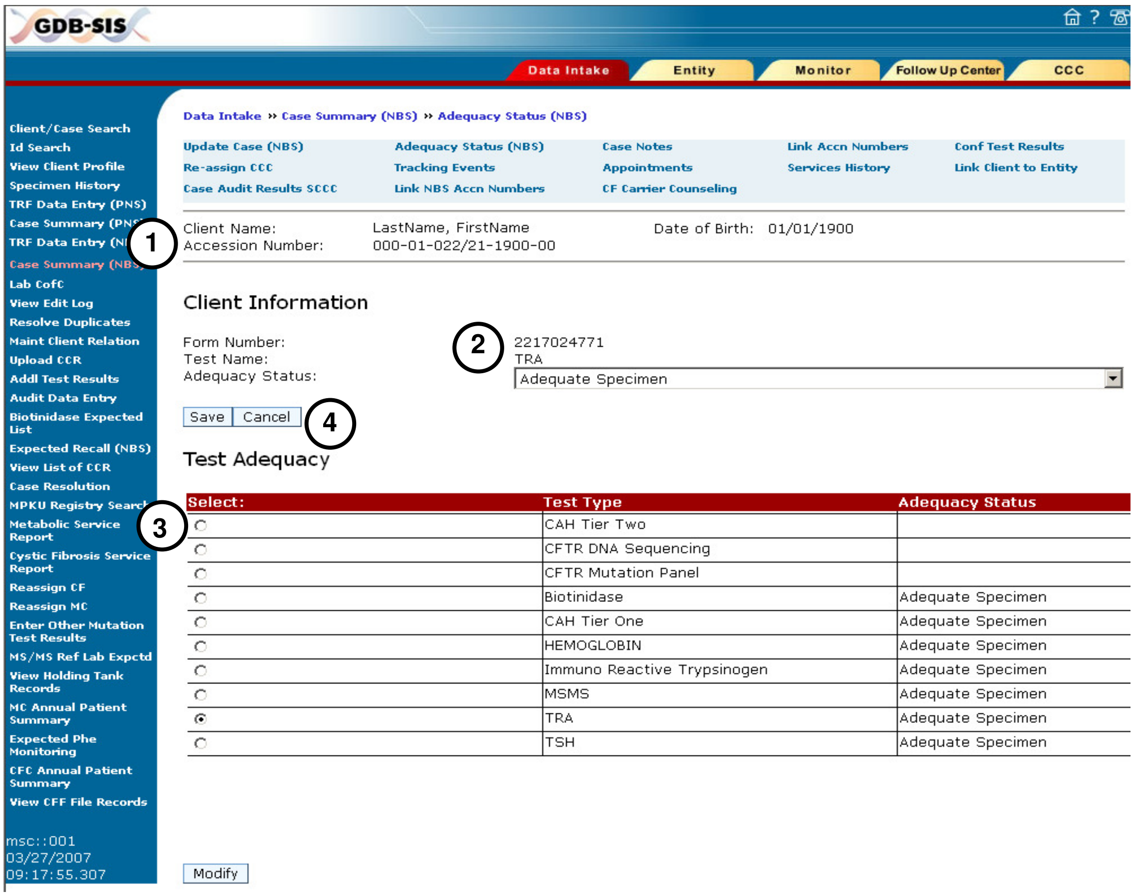
8. **Treatment Initiated or Changed:** Displays types of treatments that may be prescribed for a patient. Identify the treatment(s) for this case by checking the checkbox next to the treatment name in the **Check All That Apply** column. Enter the date each prescribed treatment was initiated or changed in the **Date** column.
9. **Global Health Assessment:** Select from the dropdown box.
10. **Health Status/Problems:** Displays all the potential health problems or clinical findings for a patient. If the **Asymptomatic** box is checked, the other checkboxes listed will become disabled. If patient is symptomatic, check each box that applies.
11. Check this box if patient died and enter date of death using calendar icon provided. Use dropdown box to indicate whether death was due to a metabolic disorder and enter the cause of death description in the box provided.
12. Click **Cancel** to return to the original history grid.

Modify Adequacy Status (NBS)

Data Intake >> Case Summary (NBS) >> Adequacy Status (NBS)

This screen allows the user to view and modify the Adequacy Status for a certain test. The user can change the Adequacy Status whenever the test results are incomplete and need to be re-sent from the lab.

FIGURE 1



1. **Client Information** is displayed in read-only format, based on the information from the Case Summary (NBS) screen.

2. This section contains test information for a selected test result.

3. To change the **Adequacy Status** click the radio button next to a row in the **Test Adequacy** grid and click the **Modify** button. Then select the appropriate **Adequacy Status**.

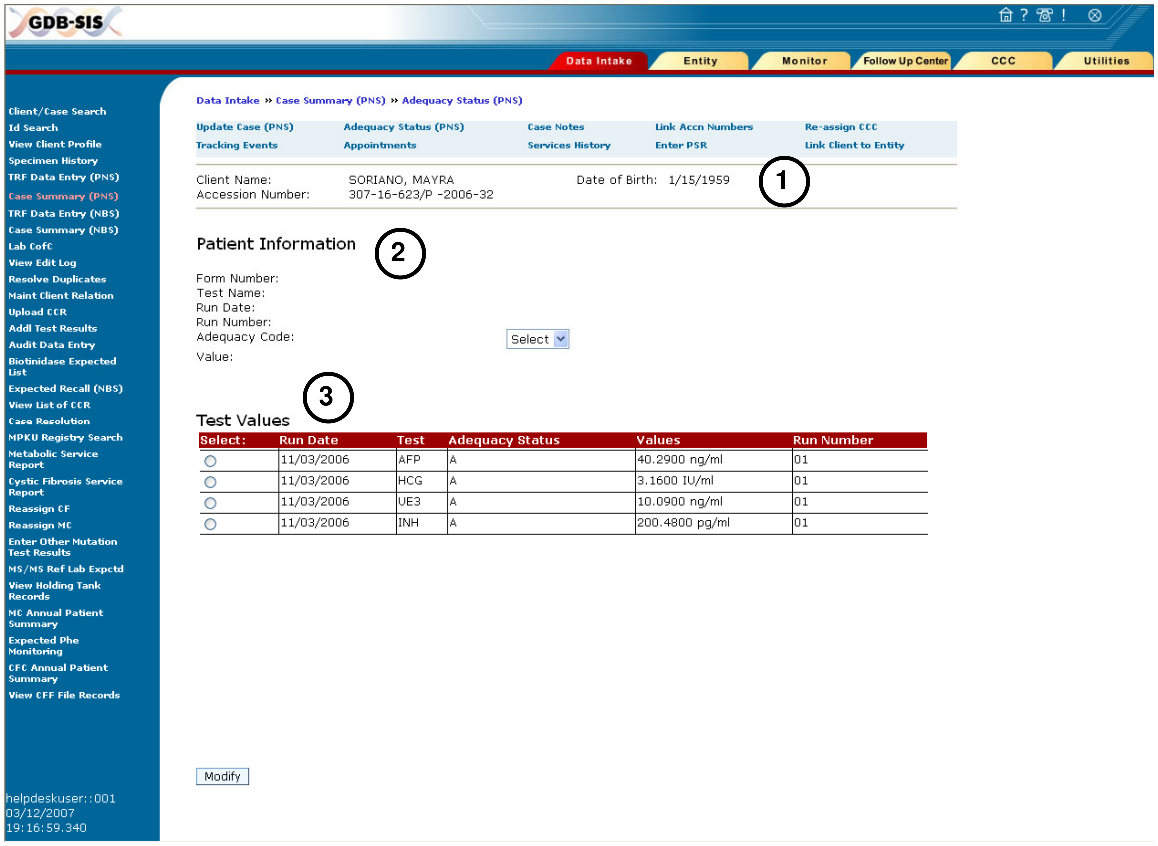
4. **Buttons:**
   a. **Save:** Saves changes to **Adequacy Status.**
   b. **Cancel:** Cancels the operation.

Modify Adequacy Status (PNS)

Data Intake >> Case Summary (PNS) >> Adequacy Status (PNS)

This screen allows the user to view and modify the Adequacy Status for a certain analyte. The user will modify the Adequacy Status whenever the test results are incomplete and need to be re-sent from the lab.

FIGURE 1



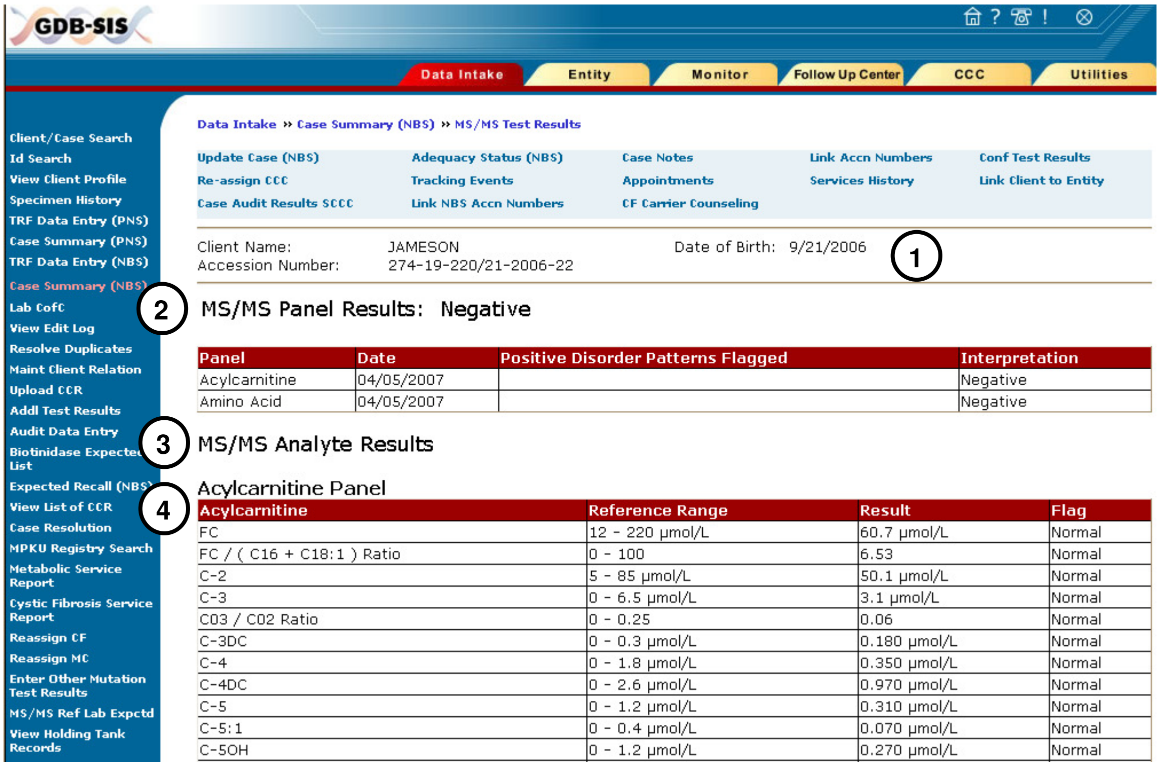
1. Basic client information and the case accession number is displayed in a read-only format, based on the information from the Case Summary (PNS) screen.
2. **Patient Information:** Select an Adequacy Code from the dropdown box.
3. **Test Values:** Make a selection by clicking on a radio button and then clicking the **Modify** button.

MS/MS Test Results

Data Intake >> Case Summary (NBS) >> MS/MS Test Results

This screen displays the MSMS Test Results for a newborn screening case. This screen is invoked from the Case Summary (NBS) screen only when MS/MS Results have been received for the client.

FIGURE 1



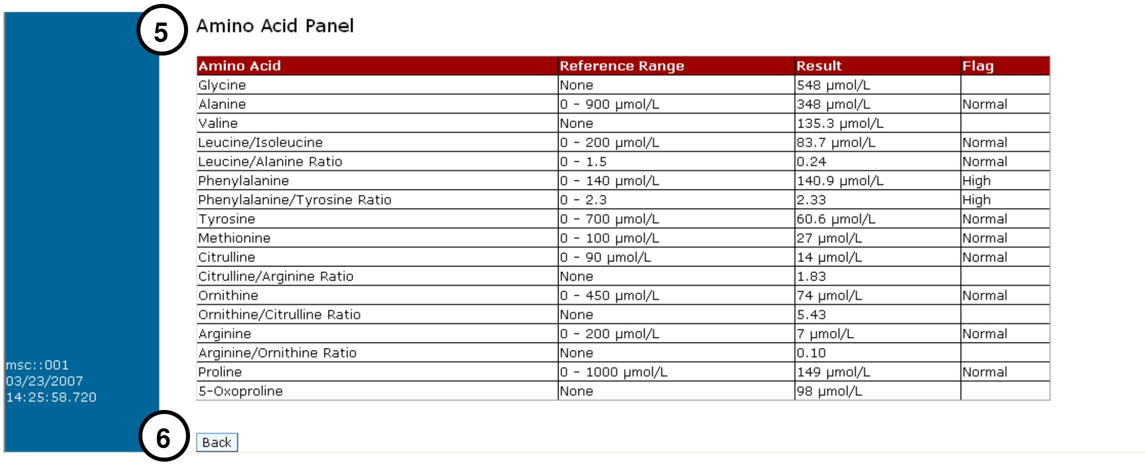
Panel	Date	Positive Disorder Patterns Flagged	Interpretation
Acylcarnitine	04/05/2007		Negative
Amino Acid	04/05/2007		Negative

Acylcarnitine	Reference Range	Result	Flag
FC	12 - 220 µmol/L	60.7 µmol/L	Normal
FC / (C16 + C18:1) Ratio	0 - 100	6.53	Normal
C-2	5 - 85 µmol/L	50.1 µmol/L	Normal
C-3	0 - 6.5 µmol/L	3.1 µmol/L	Normal
C03 / C02 Ratio	0 - 0.25	0.06	Normal
C-3DC	0 - 0.3 µmol/L	0.180 µmol/L	Normal
C-4	0 - 1.8 µmol/L	0.350 µmol/L	Normal
C-4DC	0 - 2.6 µmol/L	0.970 µmol/L	Normal
C-5	0 - 1.2 µmol/L	0.310 µmol/L	Normal
C-5:1	0 - 0.4 µmol/L	0.070 µmol/L	Normal
C-5OH	0 - 1.2 µmol/L	0.270 µmol/L	Normal

1. Displays client and case information in read-only format.
2. **MS/MS Panel Results:** This grid lists the MS/MS Panel results received on the case.
3. **MS/MS Analyte Results:** This grid lists the MS/MS analyte results received on the case.
4. **Acylcarnitine Panel:** This grid lists the results of the analytes present in the Acylcarnitine Panel, including reference ranges, actual tests results, and analysis.

MS/MS Test Results (continued)

FIGURE 2



Amino Acid	Reference Range	Result	Flag
Glycine	None	548 µmol/L	
Alanine	0 - 900 µmol/L	348 µmol/L	Normal
Valine	None	135.3 µmol/L	
Leucine/Isoleucine	0 - 200 µmol/L	83.7 µmol/L	Normal
Leucine/Alanine Ratio	0 - 1.5	0.24	Normal
Phenylalanine	0 - 140 µmol/L	140.9 µmol/L	High
Phenylalanine/Tyrosine Ratio	0 - 2.3	2.33	High
Tyrosine	0 - 700 µmol/L	60.6 µmol/L	Normal
Methionine	0 - 100 µmol/L	27 µmol/L	Normal
Citrulline	0 - 90 µmol/L	14 µmol/L	Normal
Citrulline/Arginine Ratio	None	1.83	
Ornithine	0 - 450 µmol/L	74 µmol/L	Normal
Ornithine/Citrulline Ratio	None	5.43	
Arginine	0 - 200 µmol/L	7 µmol/L	Normal
Arginine/Ornithine Ratio	None	0.10	
Proline	0 - 1000 µmol/L	149 µmol/L	Normal
5-Oxoproline	None	98 µmol/L	

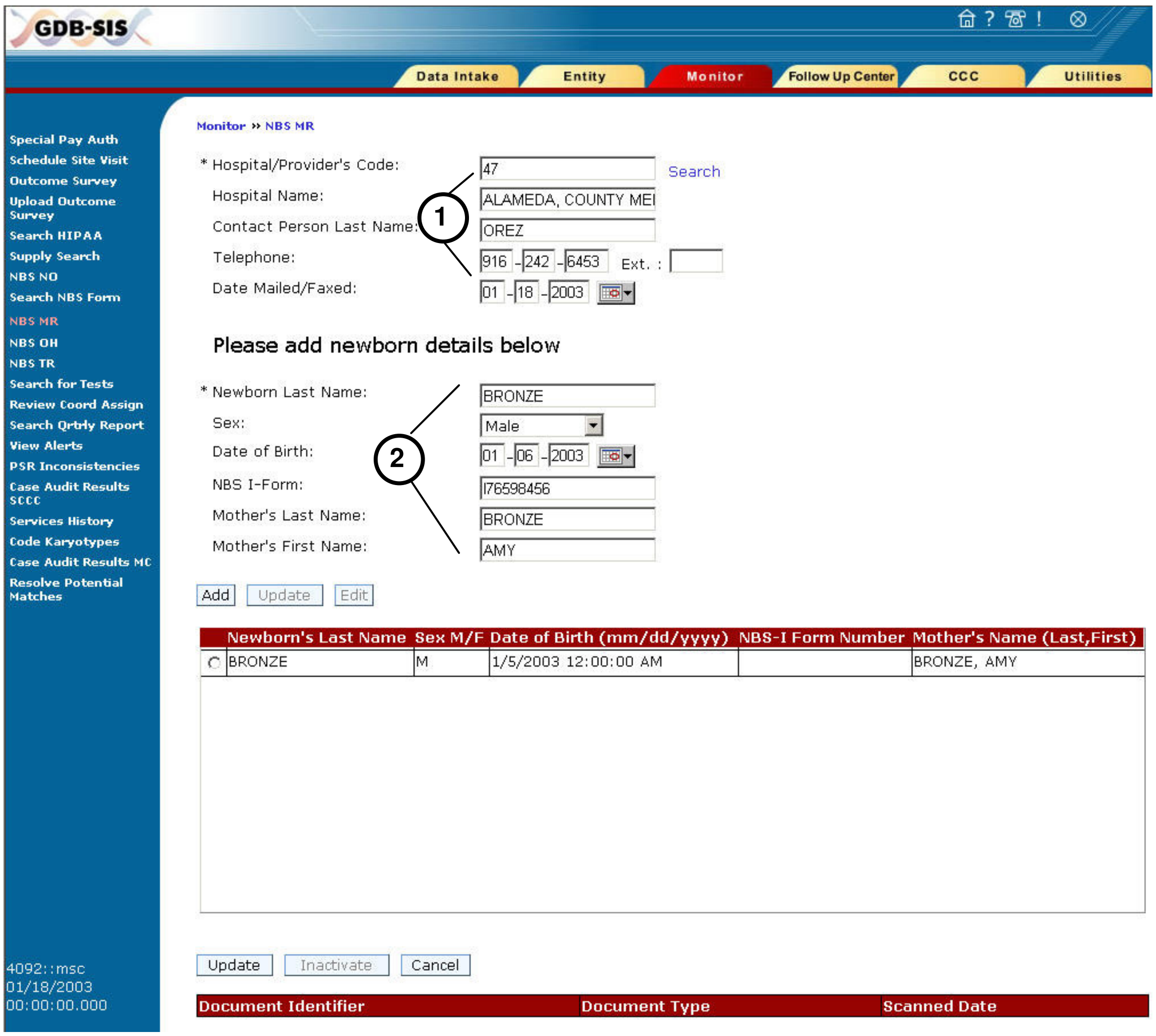
5. **Amino Acid Panel:** This grid lists the results of the analytes present in the Amino Acid Panel, including reference ranges, actual test results, and analysis.
6. **Buttons**:
   a. **Back:** Navigates the user back to the Case Summary (NBS) screen populated for the case that appears in the header.

NBS MR (Missing Result)

Monitor >> NBS MR

This screen is used to record newborn screening missing results. This form will normally be entered into SIS using Optical Character Recognition (OCR). If the form cannot be OCR'd because it is torn or for some other reason, you may enter the data directly into SIS.

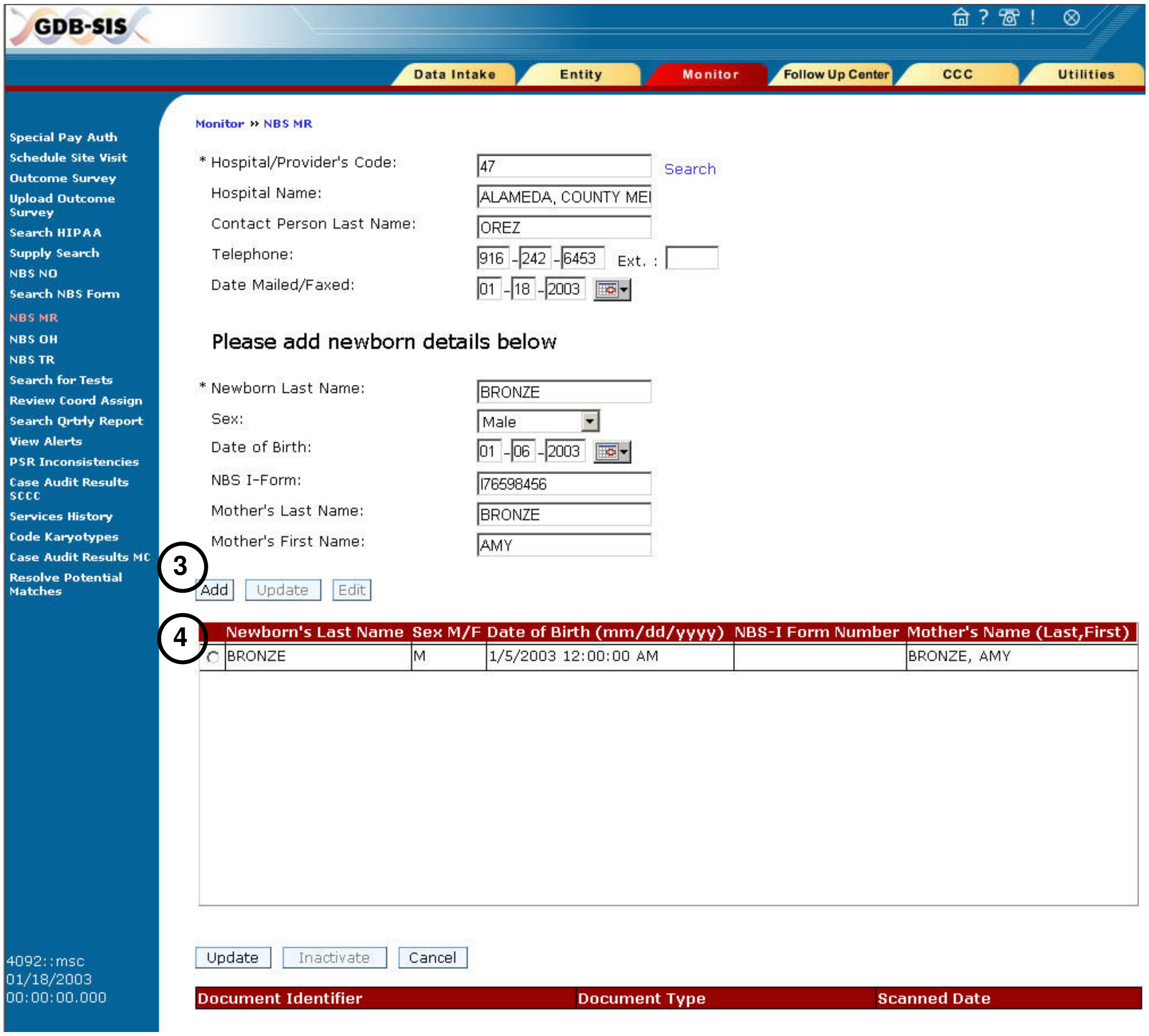
FIGURE 1



1. Hospital/Provider information – **Hospital/Provider Code** is required. The **Search** link may be used to locate a Hospital's Provider Code, and populate the **Hospital/Provider's Code** and **Hospital Name** fields.
2. Newborn information – **Newborn Last Name** is a required field.

NBS MR (Missing Result) (continued)

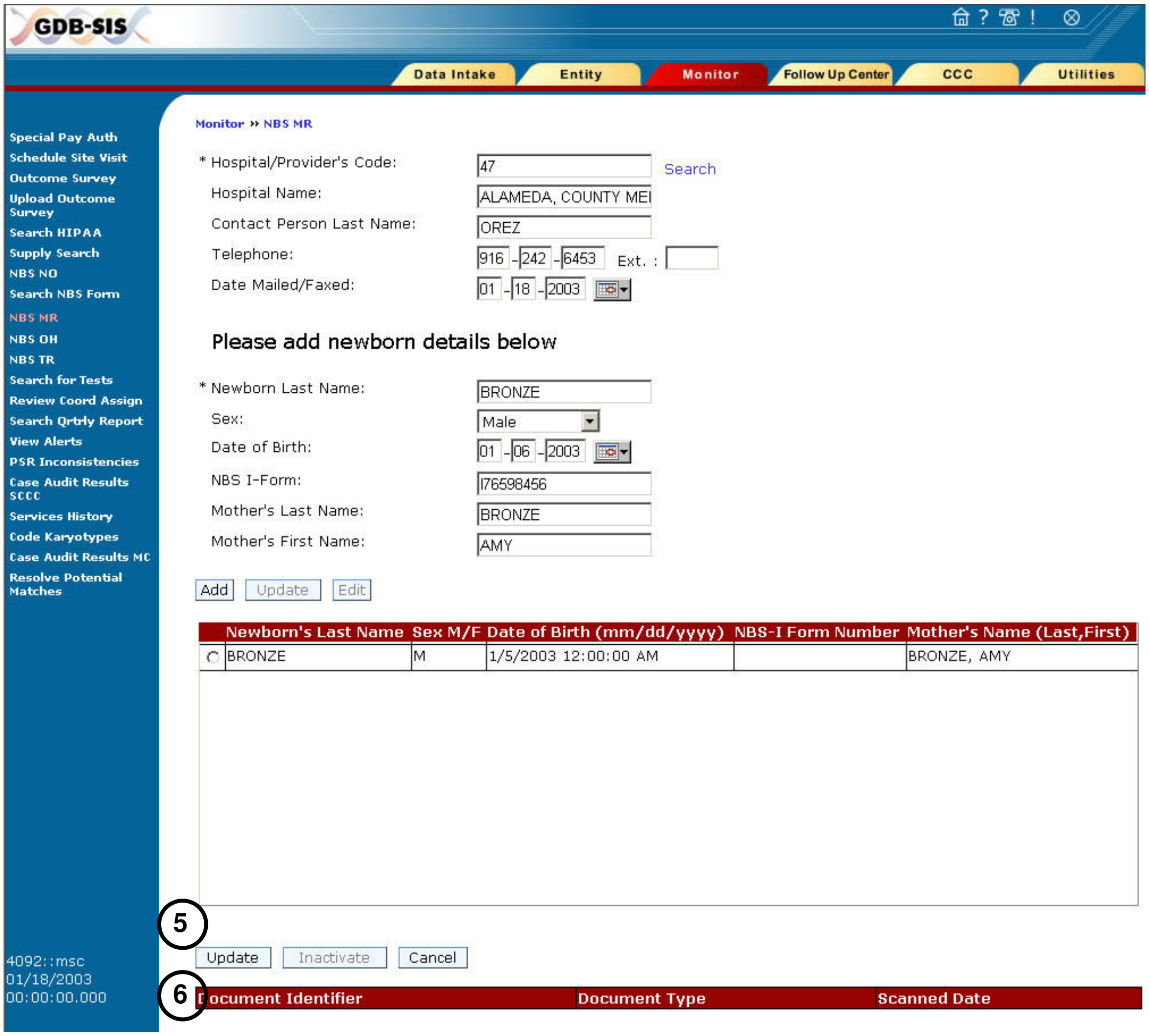
FIGURE 2



3. **Buttons:**
   a. **Add** – Adds information entered in the Newborn details fields to the grid below.
   b. **Update** – Updates MR forms selected from the grid.
   c. **Edit** – Allows editing of a selected MR form.
4. Missing test information. This screen is used to enter provider requests for missing newborn screening test results. Requests will be added to the grid allowing multiple entries. SIS will attempt to find a match to existing test results. If a match is found, SIS will automatically mail the results to the requesting hospital.

NBS MR (Missing Result) (continued)

FIGURE 3



5. **Buttons:**
   a. **Update** – Allows you to update an MR entry by clicking the radio button next to a row in the grid and then clicking the **Update** button.
   b. **Inactivate** – May be used by CCC to inactivate the request when the request cannot be matched with test results.
   c. **Cancel** – Clears all fields except the Hospital/Provider Code above, allowing another MR to be entered for the same Hospital/Provider.
6. Links to any scanned documents will be displayed in this grid.

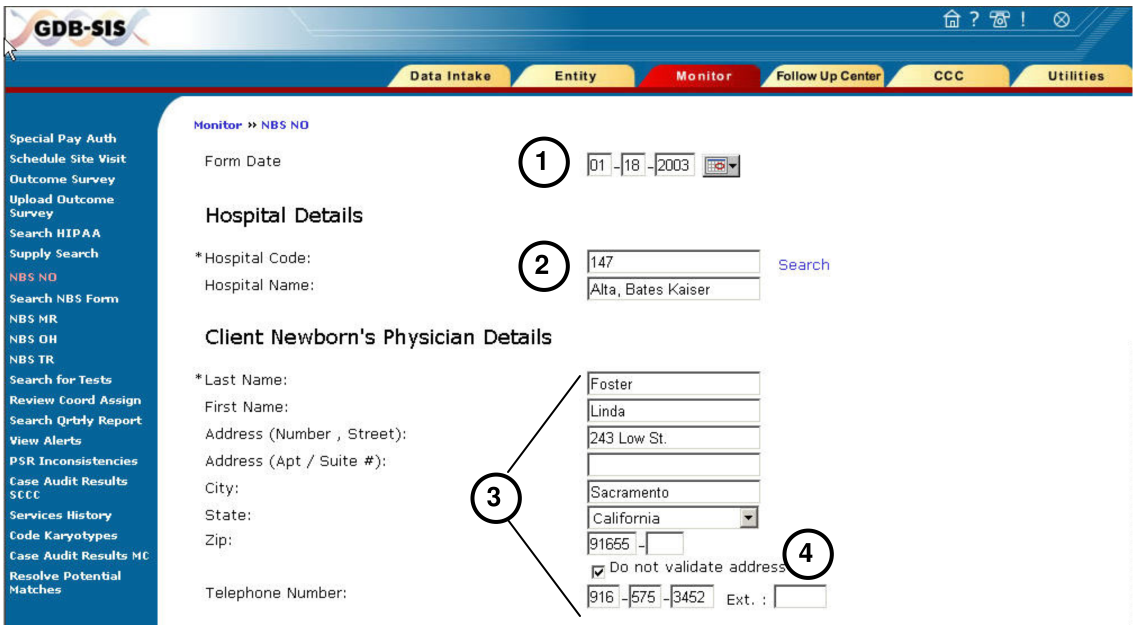
NBS NO (Specimen Not Obtained)

Monitor >> NBS NO

This screen is used to enter information about a newborn whose NBS specimen was not obtained. The newborn details and discharge information are captured on a paper form and submitted to GDB by a hospital. This form will normally be entered using Optical Character Recognition. If the form cannot be OCR'd because it is torn or for some other reason you may enter the data directly into SIS.

After entry of the NBS-NO form, a batch program will run and automatically attempt to match the form with other NBS forms and specimens. If matching is successful, the form will be removed from the manual match queue (see the Potential Match screen).

FIGURE 1

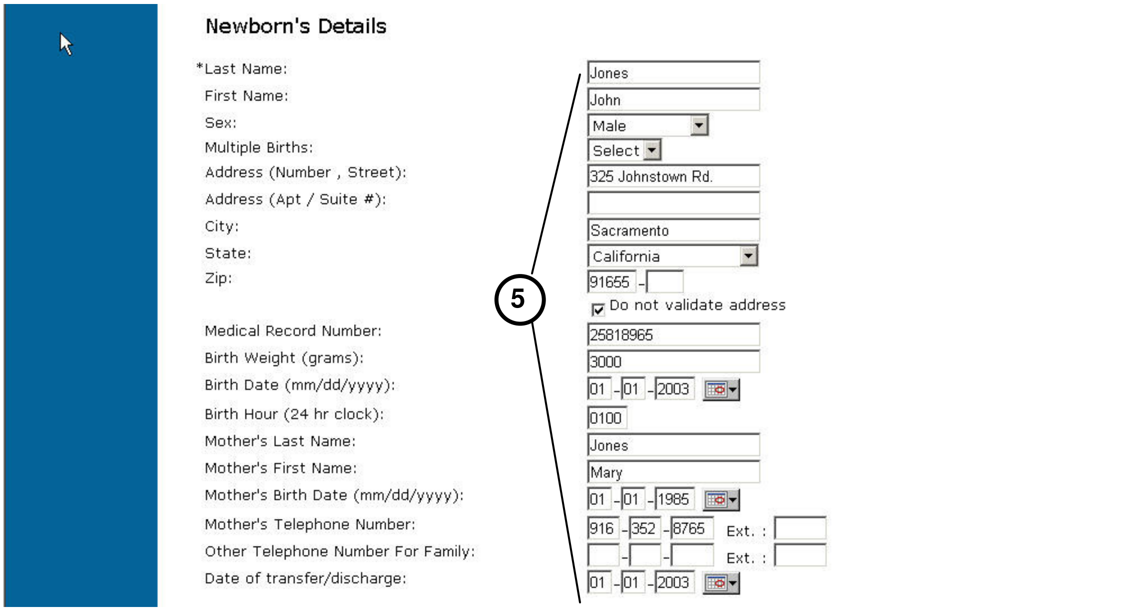


1. **Form Date** – This is the date recorded by the hospital on the paper form. You may enter the date or select it from the calendar dropdown.
2. Hospital Details – **Hospital Code** is a required field. You may enter the code directly and use the Search function to find the Hospital Name. From the search screen, you must select the hospital and click the Return Selected button to populate the Hospital Name field.
3. Client Newborn's Physician Details – **Last Name** is a required field.

   Address Information: SIS will automatically attempt to validate addresses entered. If possible, SIS will update the address information to a recognized address. For example, if you've entered 1234 Oak Dr., and the address validation program recognizes only a 1234 Oak St., it will automatically update the address information. If you elect to use the address validation feature, you should verify any corrections SIS makes to the address you have entered.
4. **Do not validate address** – Checking the box will deactivate the address validation feature.

NBS NO (Specimen Not Obtained) (continued)

FIGURE 2

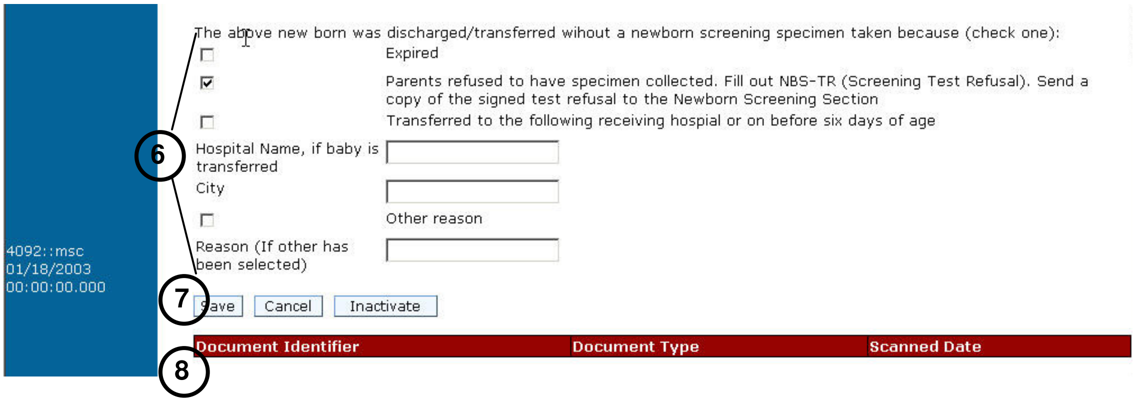


5. Newborn's Details – **Last Name** is a required field.

   Note: While mother's Last Name is an optional field on this screen, when you attempt to search for a form record, the Newborn's Last Name or Mother's Last Name a required field. As such, entry of the mother's Last Name information on this screen will be helpful for future searches.

NBS NO (Specimen Not Obtained) (continued)

FIGURE 3



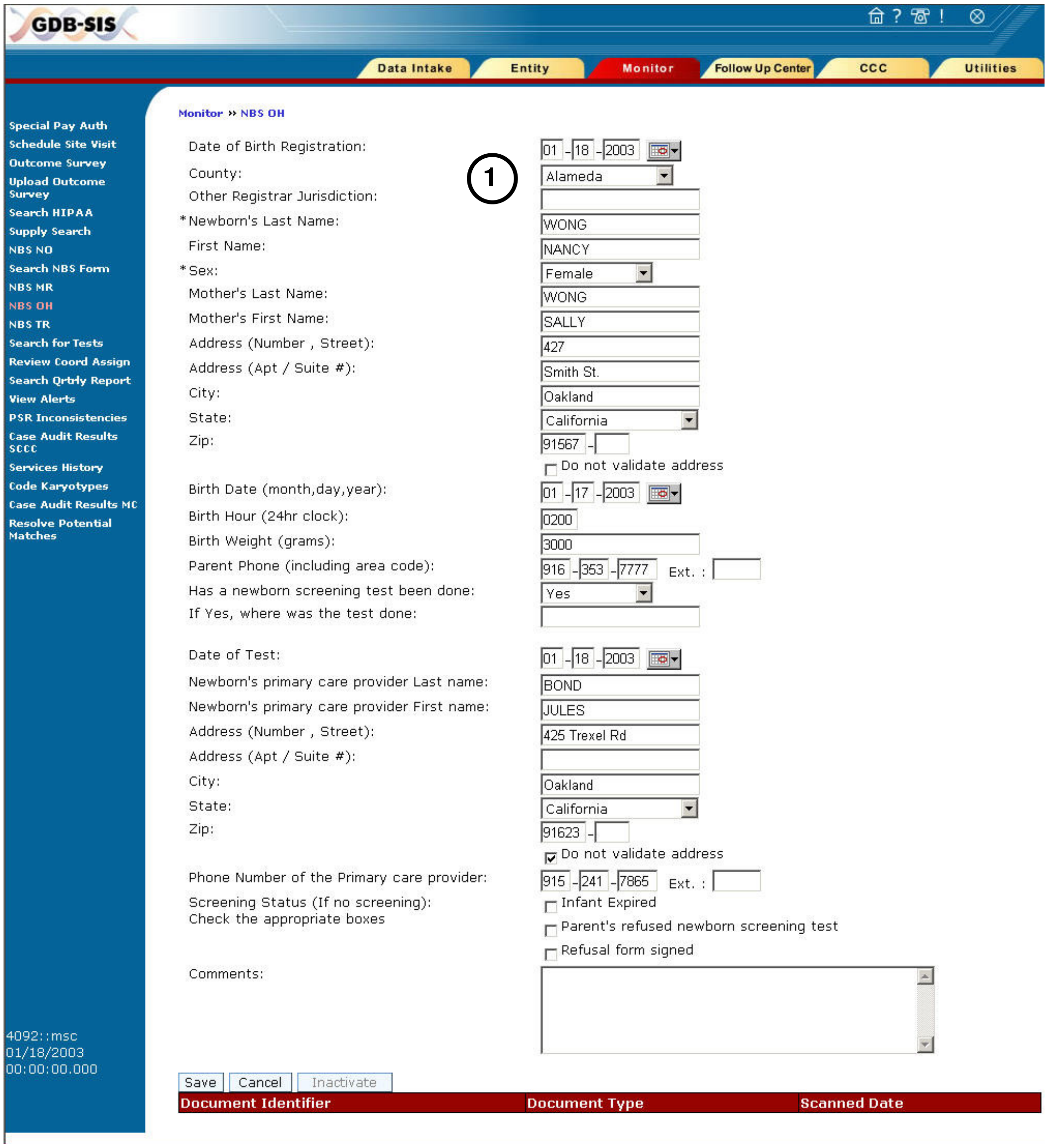
6. Reason why specimen was not obtained, and other details.
7. **Buttons**:
   a. **Save** – Saves the entered information.
   b. **Cancel** – Clears all unsaved data and reloads the screen**.**
   c. **Inactivate** – Inactivates the record. SIS will not attempt matching, but the record is not deleted.
8. Once an NBS-NO form has been scanned, it will be stored in SIS, and accessible for viewing in this scanned documents grid. A hyperlink in the grid will allow you to access the image for viewing.

NBS OH (Out of Hospital)

Monitor >> NBS OH

This screen is used to enter information for a birth that occurred outside of a licensed healthcare facility. This form will normally be entered into SIS using Optical Character Recognition (OCR). If the form cannot be OCR'd because it is torn or for some other reason, you may enter the data directly into SIS.

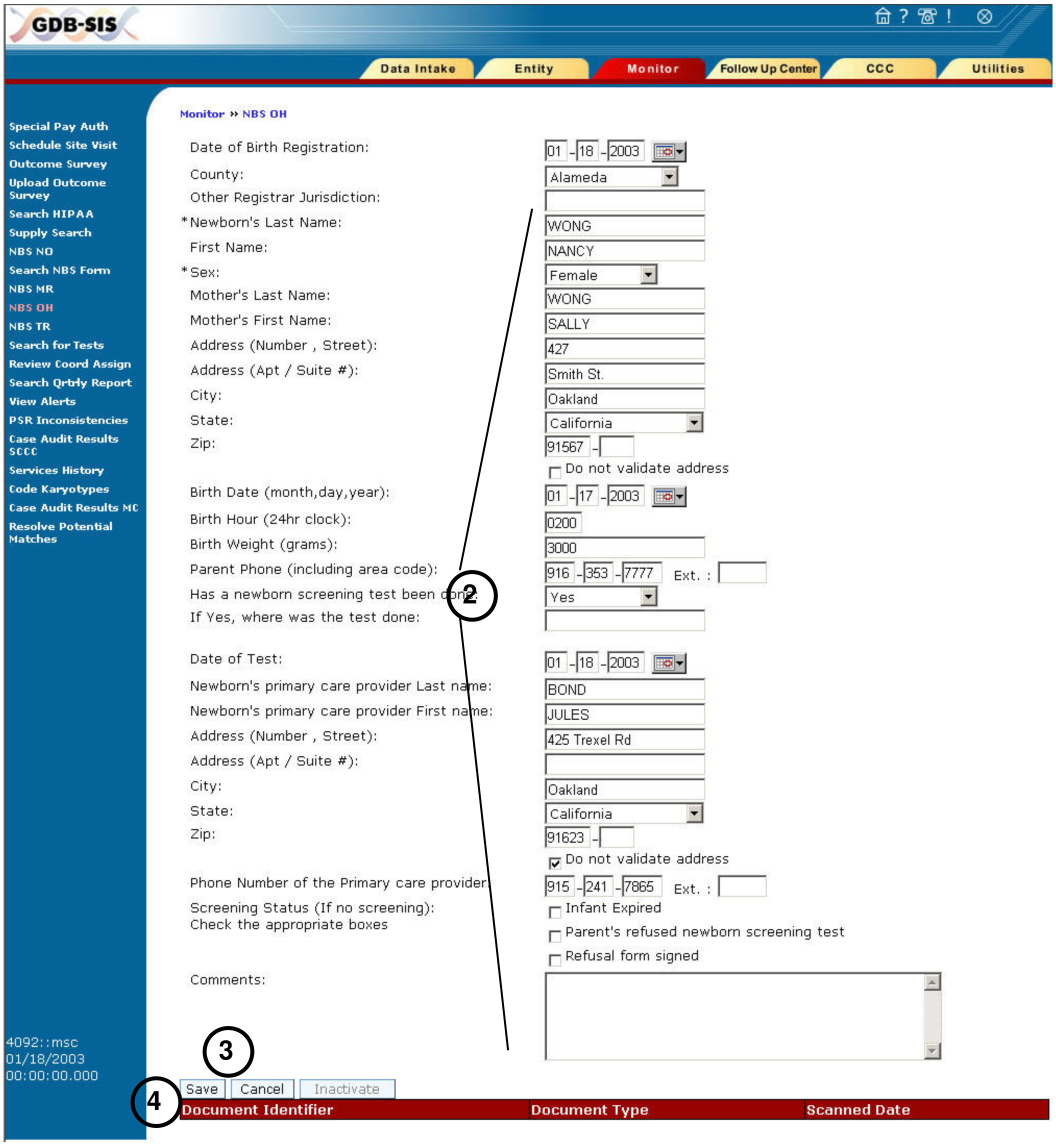
FIGURE 1



1. Birth registration information. SIS will attempt to match this information with other NBS forms in SIS. If potential matches are found (SIS did not make a definitive match), they will be displayed on the Resolve Potential Matches screen for resolution by the GDB Monitor.

NBS OH (Out of Hospital) (continued)

FIGURE 2



2. Newborn and provider information. **Newborn's Last Name** and **Sex** are required fields.
3. Buttons:
   a. **Save** – Saves the entered information.
   b. **Cancel** – Clears all fields.
   c. **Inactivate** – The CCC may inactivate matching processes for this record.
4. Links to any scanned documents will be displayed in this grid.

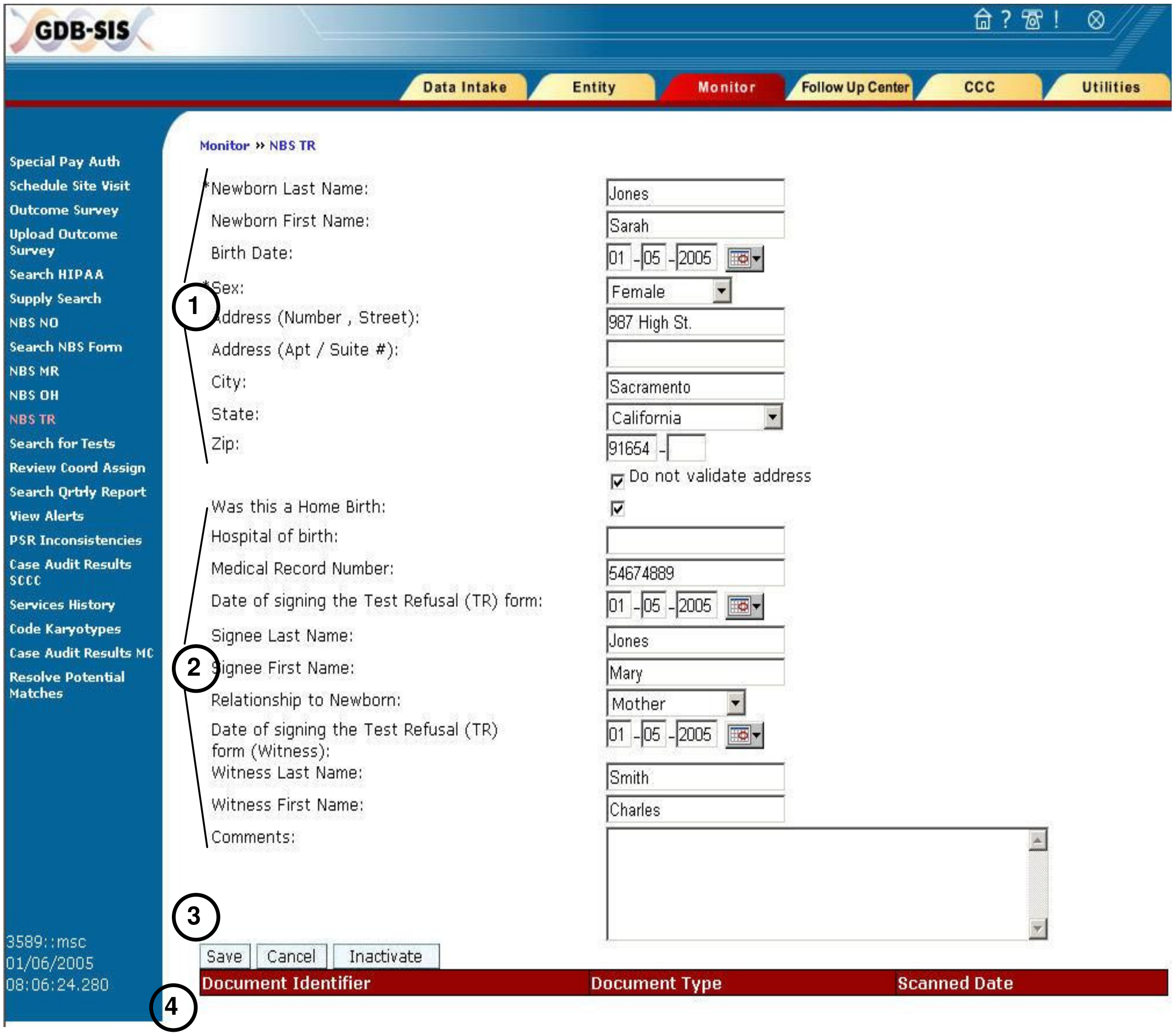
NBS TR (Test Refused)

Monitor >> NBS TR

This screen is used to record newborn screening test refusals. This form will normally be entered into SIS using Optical Character Recognition (OCR). If the form cannot be OCR'd because it is torn or for some other reason, you may enter the data directly into SIS on this screen.

SIS will not attempt to match this form to case records in SIS, such as case and client information, but will attempt to match this form with existing NBS–NO, NBS–OH and NBS–MR forms.

NBS TR (Test Refused) (continued)



1. Newborn information. **Newborn Last Name** and **Sex** are required fields.
2. Test refusal information.
3. **Buttons**:
    a. **Save** – Saves the entered information.
    b. **Cancel** – Clears all fields, discarding any unsaved data.
    c. **Inactivate** – Inactivates the record and stops the matching processes for a form that has been entered into SIS.
4. Links to any scanned documents will be displayed in this grid.

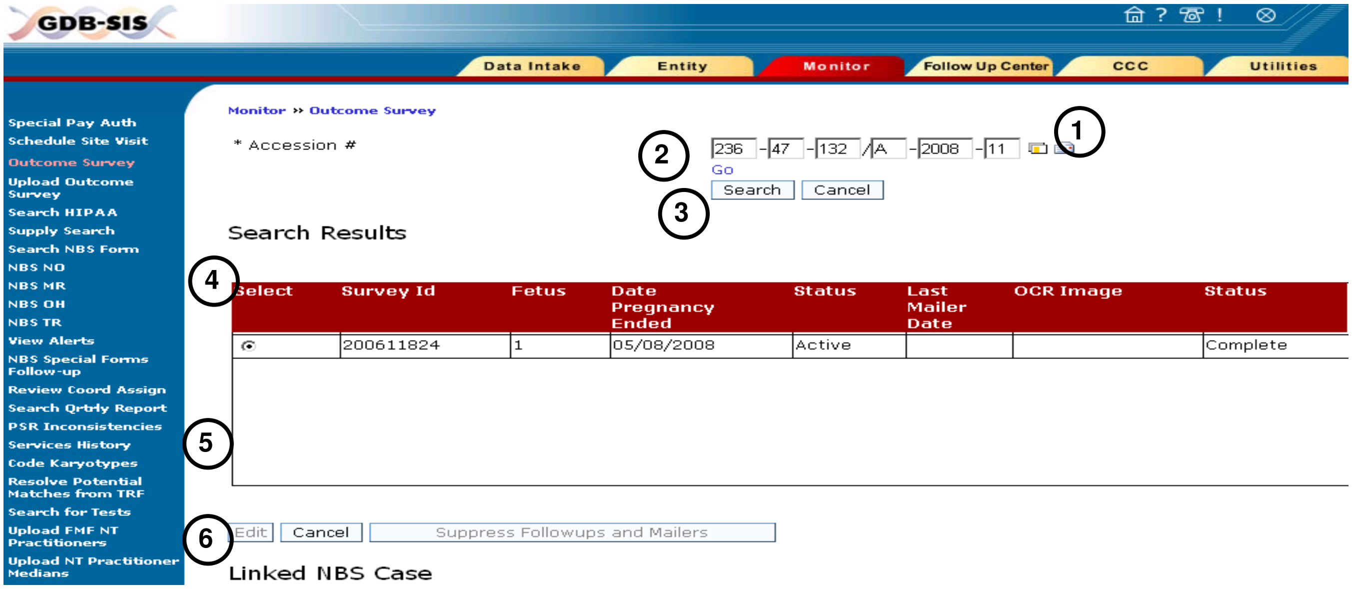
Outcome Survey

Monitor >> Outcome Survey

This screen allows you to search, view, and edit existing Outcome Surveys associated with a PNS accession number. The search results grid displays the basic outcome survey data. The Linked NBS Case grid displays any NBS cases linked to the pregnancy. This allows you to compare the outcome surveys to the NBS TRF information, and identify any discrepancies.

Outcome Survey (continued)

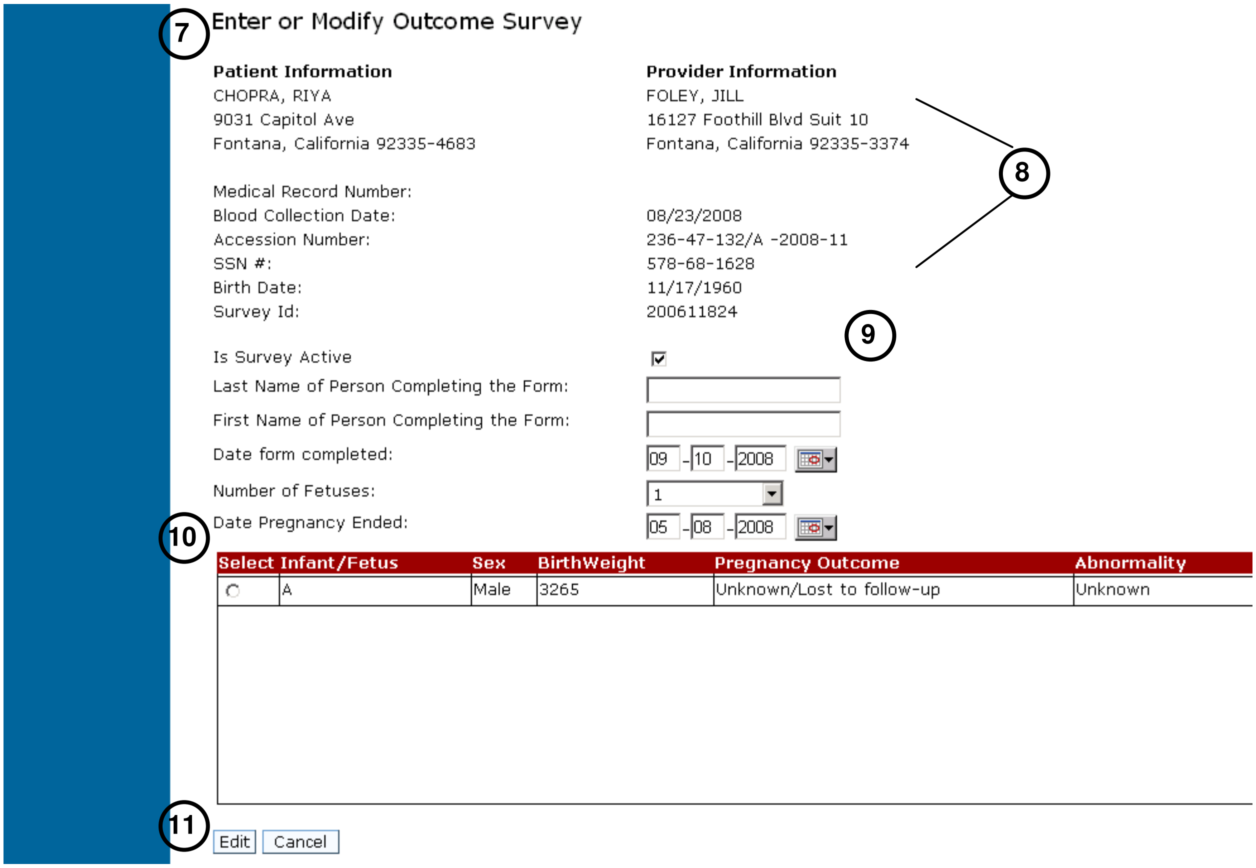
FIGURE 1



1. **Accession Number** is a required field. You must enter an accession number to search for an existing outcome survey. If there are no outcome surveys associated with an accession number, SIS will return an error to notify you that no outcome survey records were found for the accession number.
2. **Go** link directs you to the **Client/Case Search** screen, which allows you to search for and return an **Accession Number.**
3. **Buttons:**
   a. **Search** button initiates a search for outcome surveys for the entered accession number.
   b. **Cancel** button cancels the search query and directs you to the View Alerts screen.
4. Outcome survey records will be displayed in the **Search Results** grid, with the basic outcome survey data, and a link to the scanned paper form in the OCR Image column. To edit or view an outcome survey, select the survey using the radio button in the Select column, and click the **Edit** button.
5. **Buttons:**
   a. **Edit** button allows you to view, enter, and modify a selected outcome survey.
   b. **Suppress Followups and Mailers** stops the automatic SIS process for outcome surveys. No further mailers will be sent, and the case will not be referred to CCC #59. To suppress follow-ups and mailers for an outcome survey, click the **Suppress Followups and Mailers** button.
6. **Linked NBS Case** grid displays any NBS cases that are linked to a pregnancy. Basic TRF information will be displayed.

Outcome Survey (continued)

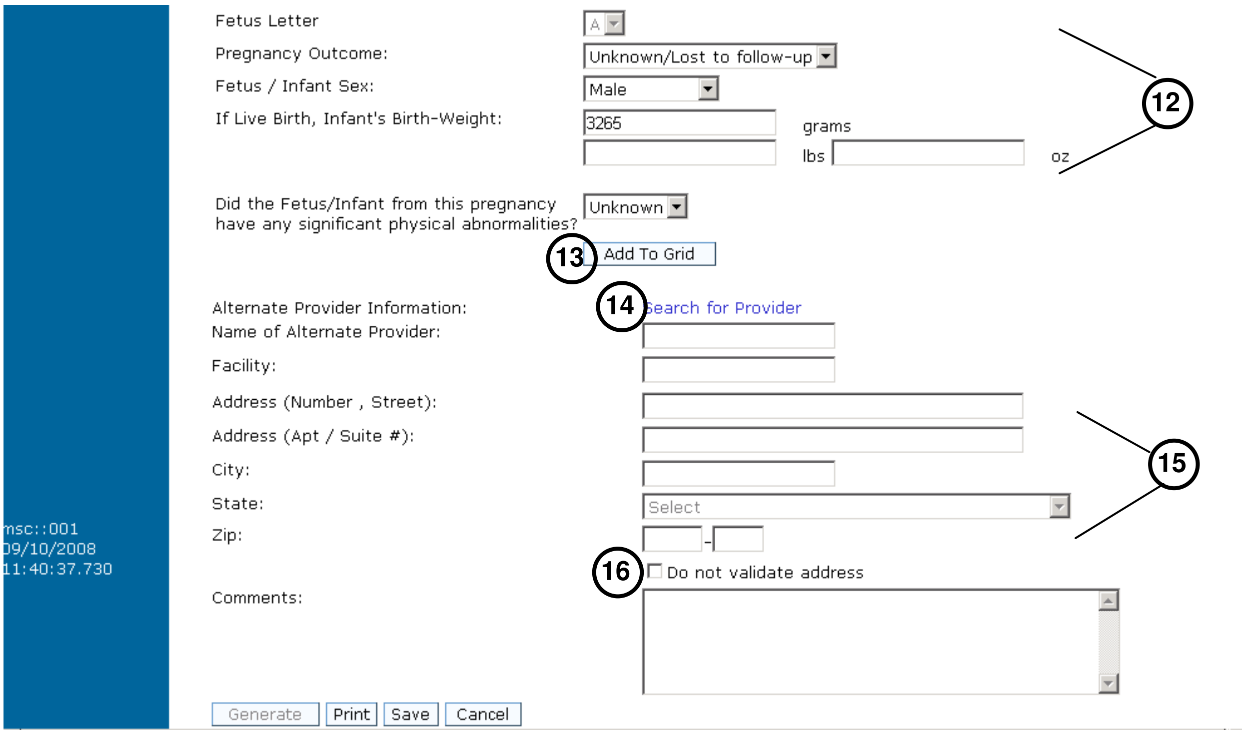
FIGURE 2



7. The **Enter or Modify Outcome Survey** section is only displayed after you click the **Edit** button above (see #5).
8. The **Patient Information** and **Provider Information** are displayed in a read-only format, based on the existing case information of the client.
9. Checking the **Is Survey Active** checkbox allows the selected outcome survey's data to become available for the registry. Check this box when the selected outcome survey is complete, or to indicate that the selected outcome survey is active among multiple outcome surveys linked to accession number currently used.
10. The Infant/Fetus grid is displayed grid when the Number of Fetuses field is one or more. Use the radio button to select which Infant/Fetus information to edit.
11. **Buttons:**
    a. For the selected Infant/Fetus, the **Edit** button displays the Infant/Fetus fields for editing (See Figure 3)
    b. **Cancel** button clears any changes made to the Infant/Fetus fields. The screen will scroll to the **Enter or Modify Outcome Survey** section.

Outcome Survey (continued)

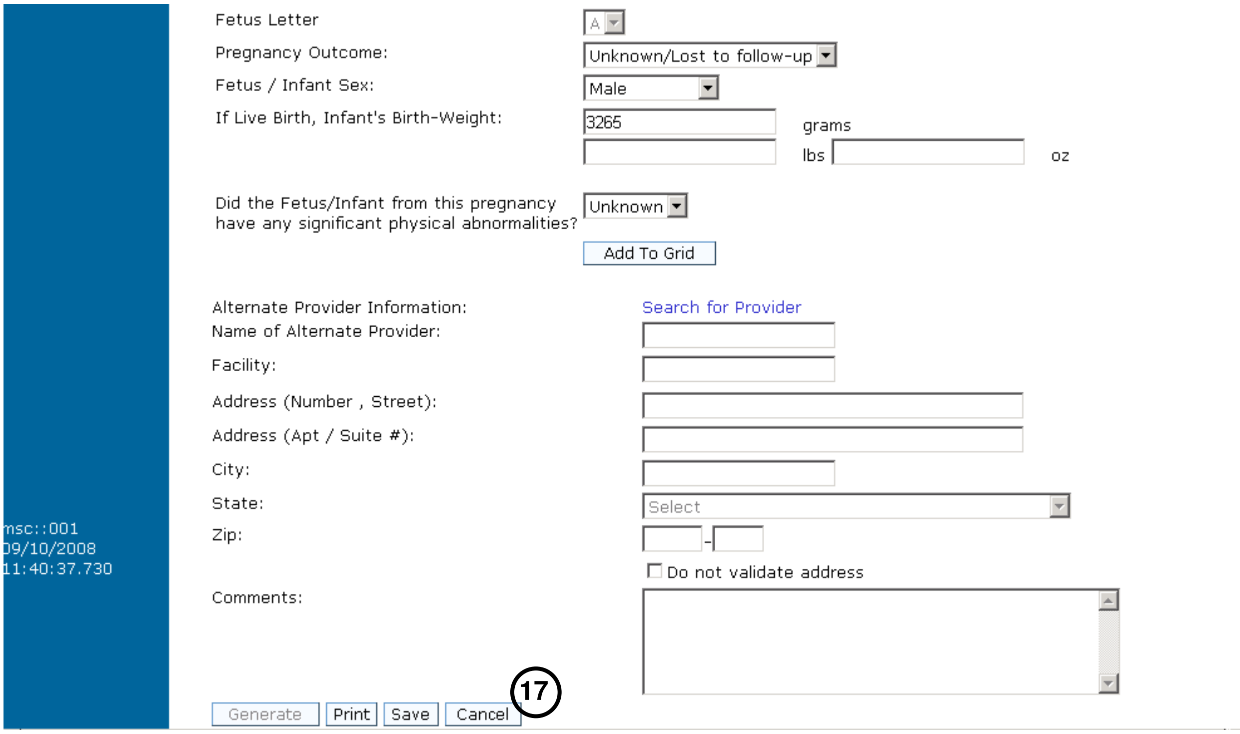
FIGURE 3



12. Once you select an Infant/Fetus and click the Edit button (see13 above), the Infant/Fetus information fields are displayed for editing.
13. **Add to Grid** button saves the data from the Infant/Fetus fields, and displays the updated information in the **Infant**/**Fetus** grid.
14. You must click the **Search for Provider** link to obtain the **Alternate Provider Information** from the Search Entity screen.
15. Address Information: SIS will automatically attempt to validate addresses entered. If possible, SIS will update the address information to a recognized address. For example, if you've entered 1234 Oak Dr., and the address validation program recognizes only a 1234 Oak St., it will automatically update the address information. If you elect to use the address validation feature, you should verify any corrections SIS makes to the address you have entered.
16. **Do not validate address** – Checking the box will deactivate the address validation feature.

Outcome Survey (continued)

FIGURE 4



17. **Buttons:**

   a. **Generate** button will send a new survey to the provider. If no outcome survey data has been entered from a previous outcome survey, a new survey will be sent to the alternate provider. The **Generate** button will become available after you have entered the provider information.

   b. **Print** button allows you to print the outcome survey with the current survey data, to mail this information to the provider. When the printed outcome survey is returned completed, you will not be able to scan it, as it will be in a different format than the original. Therefore, you will need to enter the data into SIS. The **Print** button will become available after you have entered the provider information.

   c. **Save** button will save the outcome survey data you have entered or changed.

   d. **Cancel** button cancels any unsaved changes made to the outcome survey, and reloads the screen.

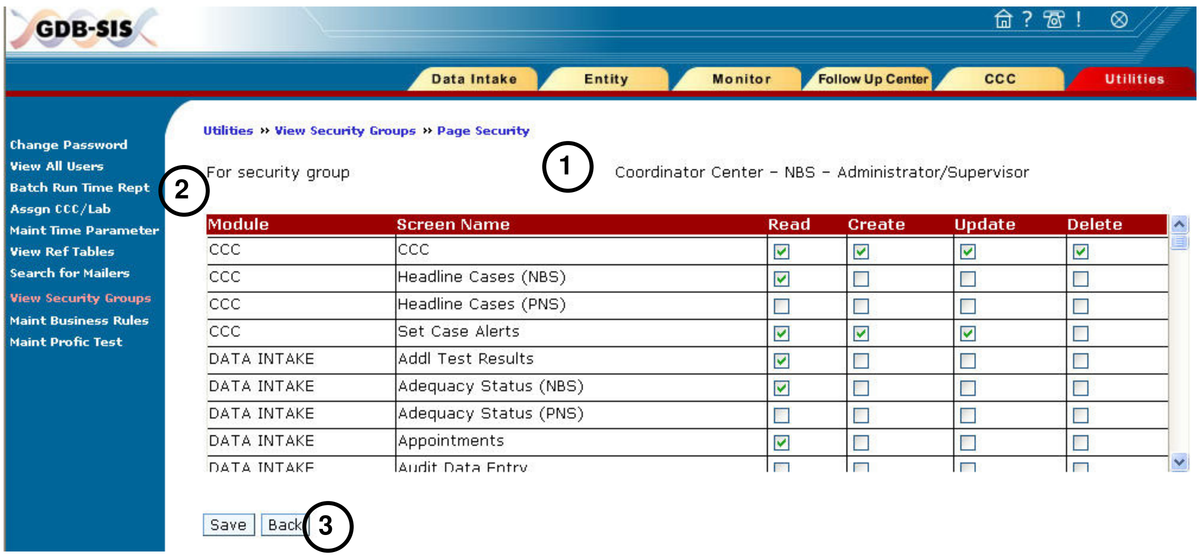
Page Security

Utilities >> View Security Groups >> Page Security

The **Page Security** screen is used to modify the Read, Create, Update and Delete permission(s) that each security group has for every screen in SIS. Following is a description of each permission available in SIS:

- **Create** – The user is allowed to create a new entry in SIS.
- **Read** – The user is allowed to view the information on the screen.
- **Update** – The user is allowed to update existing information in SIS.
- **Delete** – The user is allowed to delete an existing entry in SIS.

To access the Page Security screen select a security group on the View Security Groups screen, and click the Show Access button.



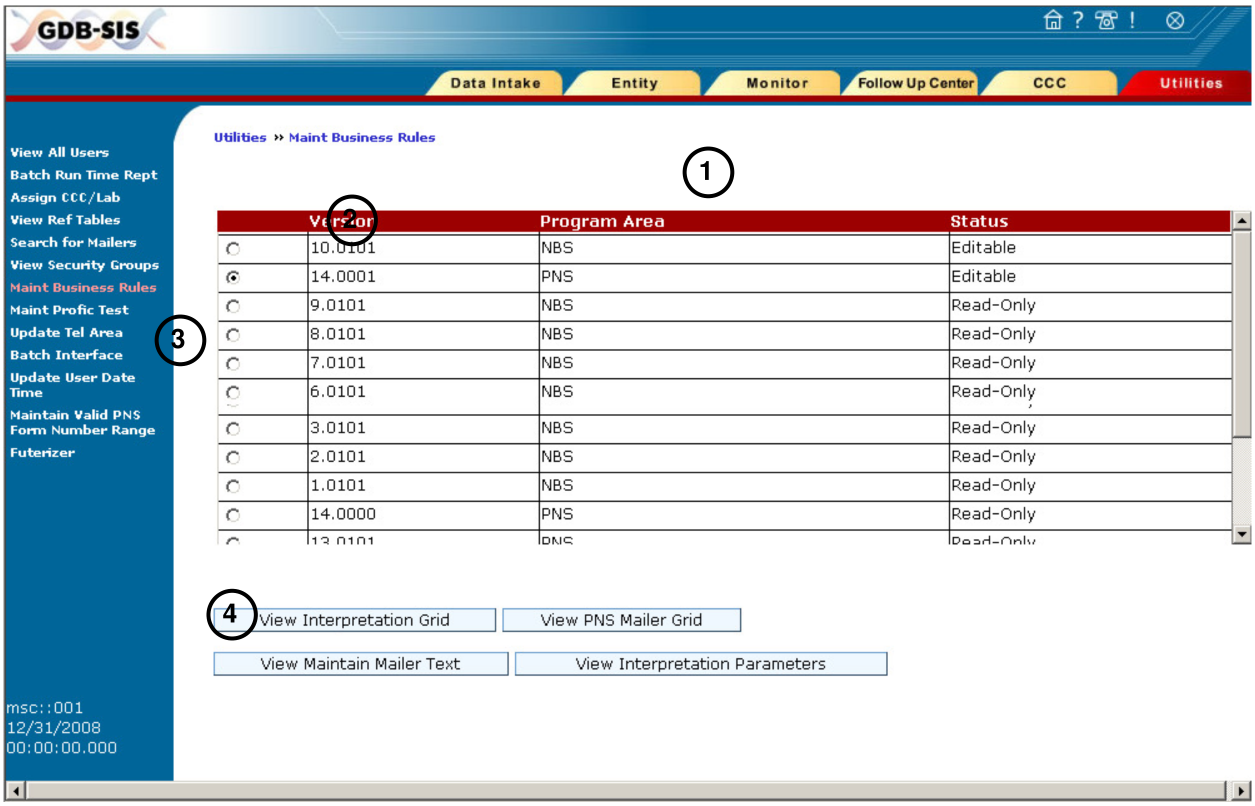
1. The selected security group is displayed in a read-only format.
2. The security grid displays the permission that the selected group has for each screen in SIS. Permissions are displayed for one screen on each row. Place a check mark in the column for the permission you wish to grant for each screen. Click an existing check mark to un-check it and remove the permission.
3. **Buttons:**
    a. Click the **Save** button to save the permissions you have granted or deleted.
    b. Click the **Back** button to return to the View Security Groups screen, discarding any unsaved changes.

PNS Interpretation Grid

Utilities >> Maint Business Rules >> PNS Interp Grid

This page maintains PNS variables that control result mailers, case status, and case interpretations. All predefined specimen conditions are listed in the grid. Depending upon your access rights in SIS, you may have the ability to update the interpretation factors, or you may only have the ability to view them.

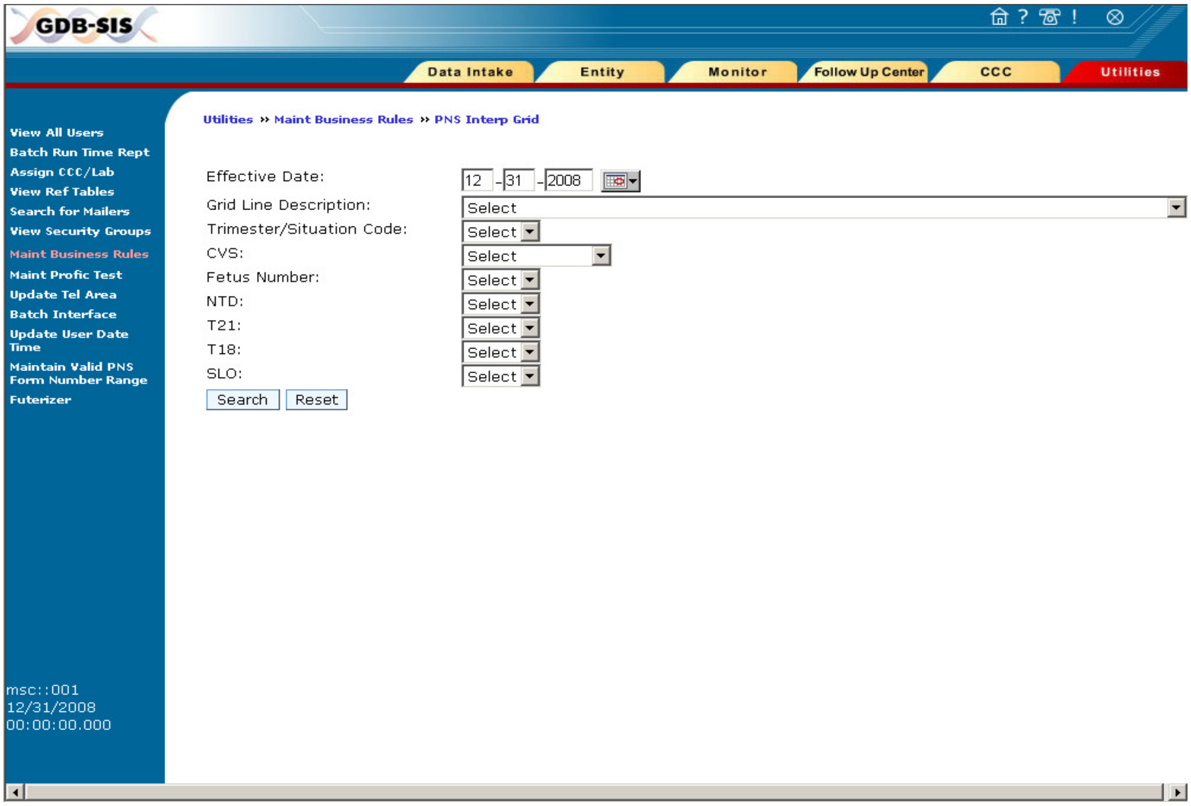
FIGURE 1



1. Select the **Version No.** from the grid only the newest versions will be editable. All previous versions will be read-only. Click on **View Interp Grid** button displays the Search page for PNS Interp grid.

PNS Interpretation Grid (continued)

FIGURE 2

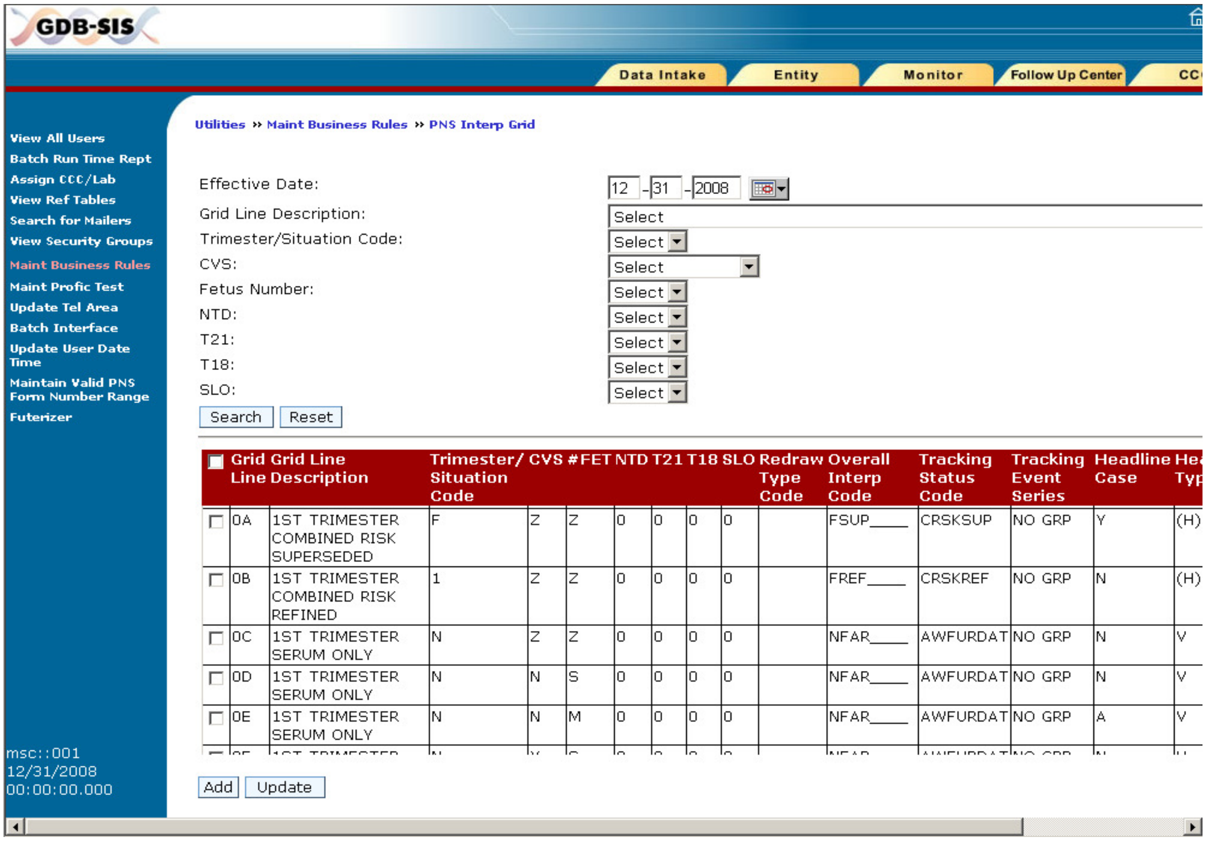


2. **Effective Date** field is for Effective Date is defaulted with the current date. If the Effective Date is a date prior to PE-II go-live date, the trimester / situation code drop down list is disabled and is defaulted to ‘Q’. The grid is populated with all gridlines that were active on the Effective Date.

3. Narrow down the Search criteria by selecting any one or more fields from the drop downs or you can directly click on **Search** button which will display all the interp gridlines as Figure 3.

PNS Interpretation Grid (continued)

FIGURE 3



4. The interpretation factor grid displays the PNS interpretation data.
5. Select one or more interpretation record for editing using the Check box next to the record, and click the Update button to change it.
6. **Buttons:**
   a. **Update** – Click update the selected interpretation record (see **FIGURE 4**).
   b. **Add –** Adds a new PNS variable (see **FIGURE 4**).

PNS Interpretation Grid (continued)

FIGURE 4

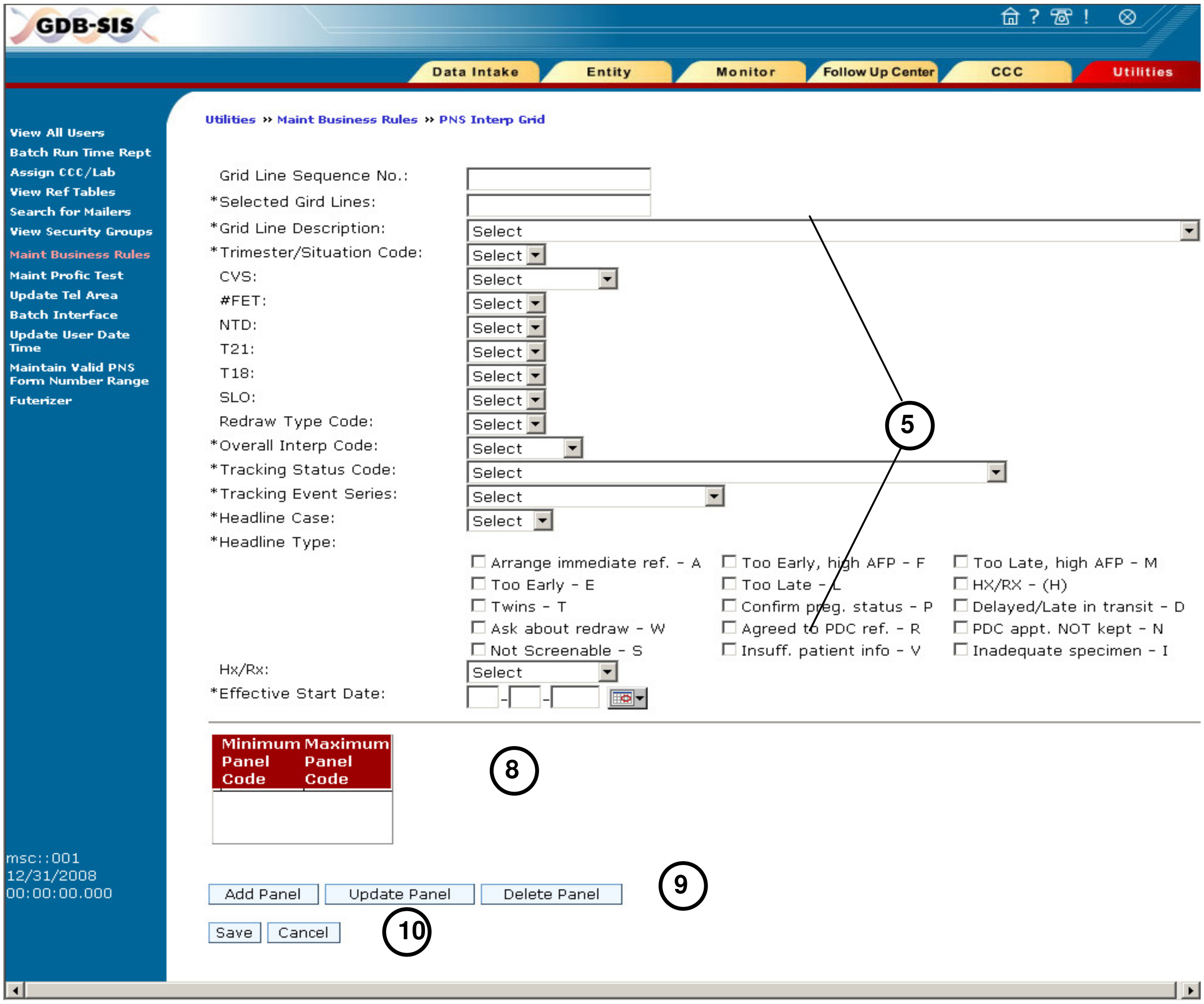


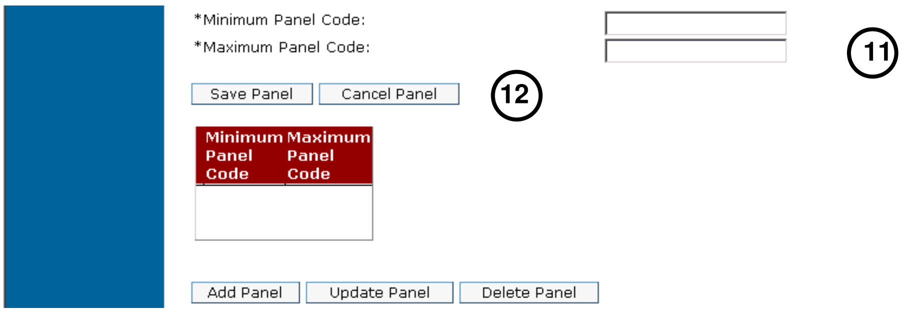
FIGURE 4 appears when you click the Add or Update button. If you click Add, the fields will be blank. If you click Update, the fields will be populated with the data from the selected record.

7. Enter PNS variable data in the fields provided.
8. The panel grid displays all existing minimum and maximum panel codes associated with the PNS variable you are editing. When adding a new PNS variable, this grid will be blank.
9. **Buttons:**
    a. **Update Panel –** Click after selecting a radio button next to a record in the panel grid to edit (see **FIGURE 4**).
    b. **Add Panel** – Add new panel codes. The add panel fields will then be displayed (see **FIGURE 4**).
    c. **Delete** Panel – Deletes the selected record from the panel grid.

PNS Interpretation Grid (continued)

10. **Buttons:**
    a. **Save –** Save the changes to the PNS variable data.
    b. **Cancel** – Cancel current action without saving and revert to PNS Interpretation Grid view displayed in **FIGURE 3**.

FIGURE 5



11. Enter the minimum and maximum panel values in the **Minimum Panel Code** and **Maximum Panel Code** fields. Both fields are required to add or update a panel record.
12. **Buttons:**
    a. **Save Panel –** Saves the panel codes. A row will be added/updated to the panel grid.
    b. **Cancel Panel –** Cancel the update action and revert to the PNS interpretation grid view displayed in **FIGURE 2** without saving.

PNS Interpretation Grid (continued)

FIGURE 6

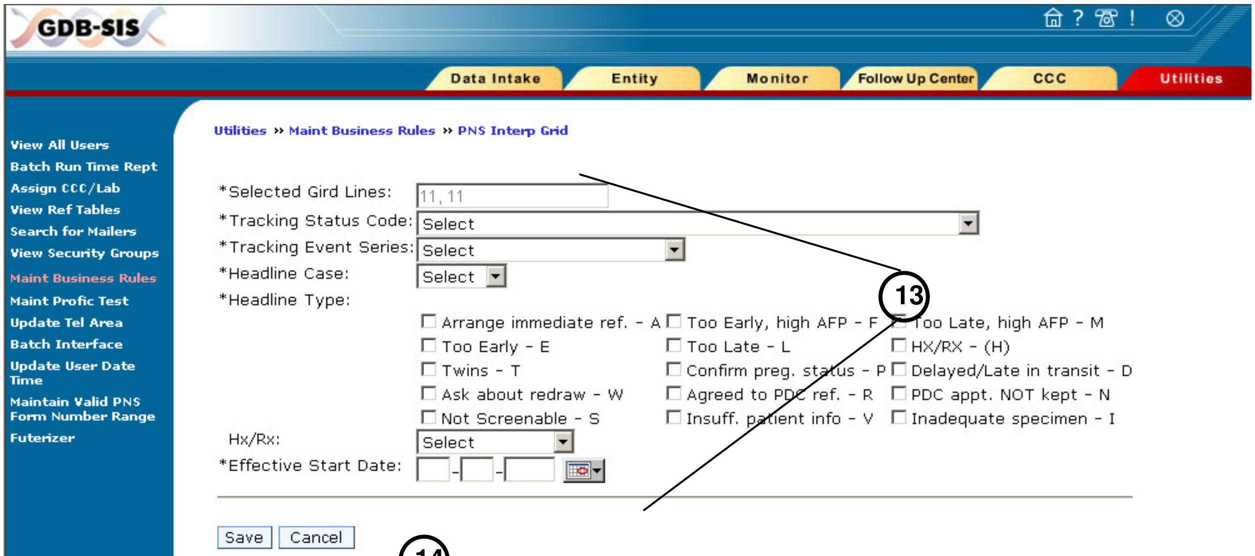


FIGURE 6 appears when user clicks the Update button after selecting multiple grid lines from previous screen (**Figure-3)**. This screen will be used to save Interp Grid details for multiple grid lines.

13. **Selected Grid Lines** is a read-only field and will display all the grid lines selected in previous screen. Enter Interp Grid details common for selected grid lines.
14. **Buttons:**
    c. **Save –** Save the changes to the PNS variable data.
    d. **Cancel** – Cancel current action without saving and revert to PNS Interpretation Grid view displayed in **FIGURE 3**.

PNS Mailer Grid

Utilities >> Maint Business Rules >> PNS Mailer Grid

This screen allows you to maintain and update the variables that control the structure of result mailers. The mailers are tied to a PNS interpretation version. Only the mailers associated with the newest interpretation versions will be editable. All previous versions will be read only.

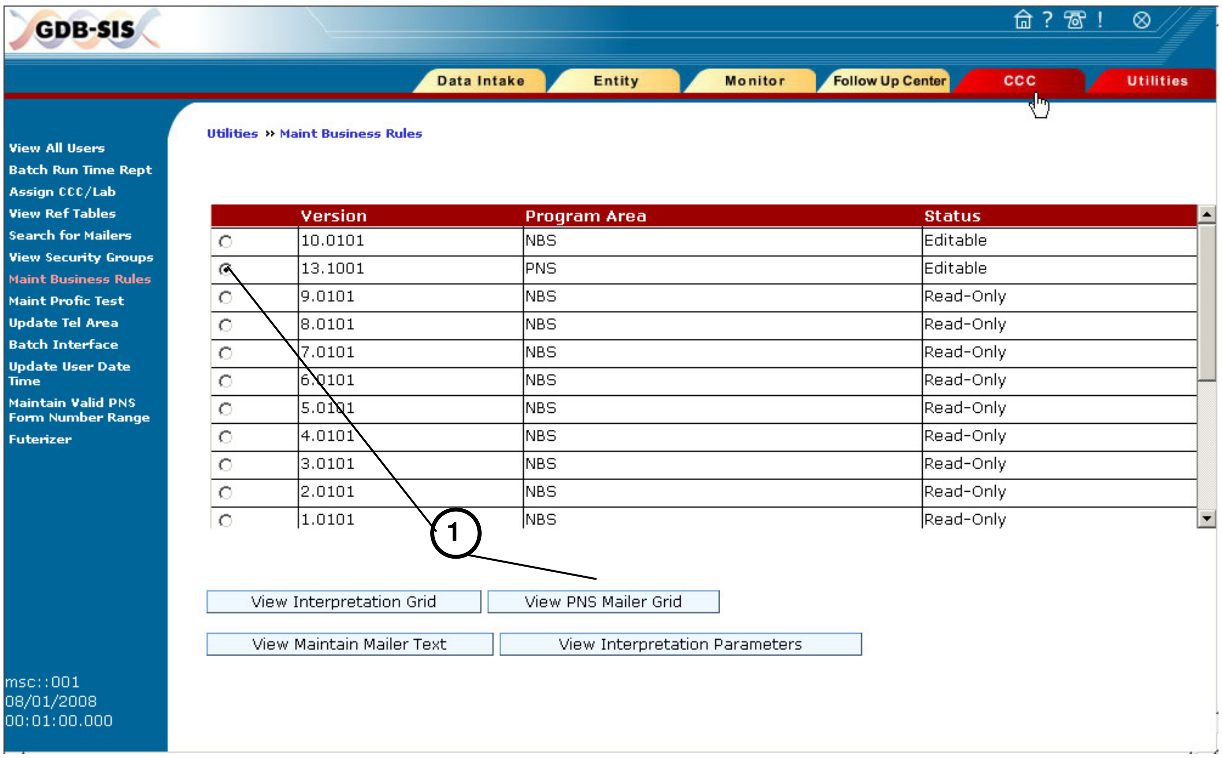


Figure 1 - Maintain Business Rules screen

1. Select the mailer grid version you would like to view/edit by selecting the **Grid Version** and clicking on “View PNS Mailer Grid” button, on Utilities >> Maint Business Rules screen**.** Only the mailer grid records associated with the newest interpretation versions will be editable. All previous versions will be read only. The above action results in navigation to Utilities >> PNS Mailer Grid screen.

PNS Mailer Grid (continued)

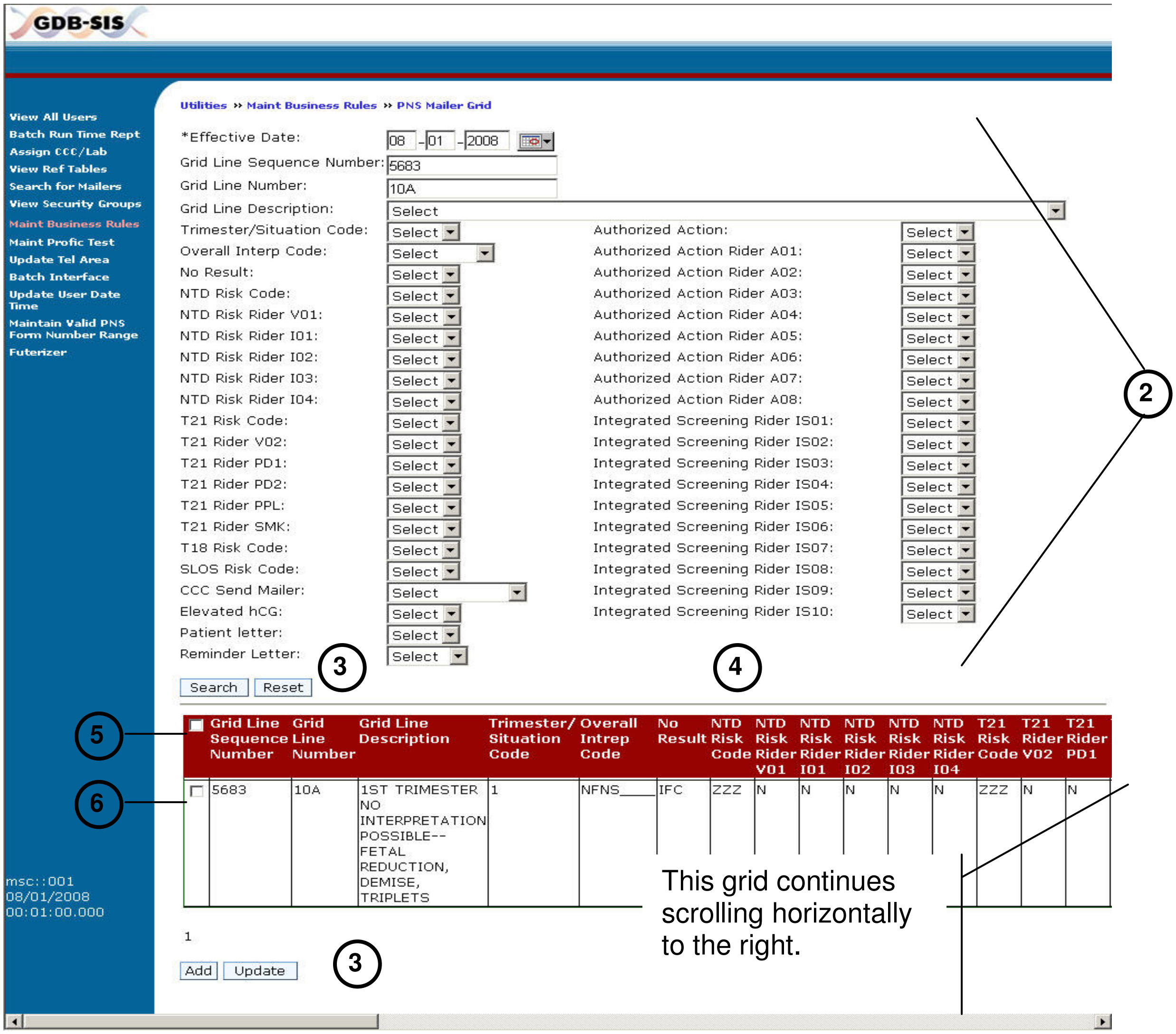


Figure 2 - PNS Mailer Grid screen

2. You can do a search based on any of the parameters as shown in Figure 2.
3. **Buttons :**
   a. **Search** – displays all gridlines based on the search criteria.
   b. **Reset** – clears all search criteria entered.
   c. **Add** – allows you to add a new mailer grid line and enter the corresponding variables (See **FIGURE 3**).
   d. **Update** – allows you to view/edit the selected grid line (**See FIGURE 4**). Update button also allows updating multiple gridlines simultaneously (**See Figure 5**)

PNS Mailer Grid (continued)

4. PNS Mailer Grid search results grid displays the mailer grid records based on the search criteria.
5. If "Select All" checkbox is selected, it checks the checkbox in front of all gridlines displayed in the result set. If unselected, clears the checkbox in front of all gridlines displayed in the result set. "Select All" checkbox is selected if you want to update all the gridlines in the search results grid simultaneously.
6. Individual checkboxes can be selected to select that particular row (or a group of rows) for update.

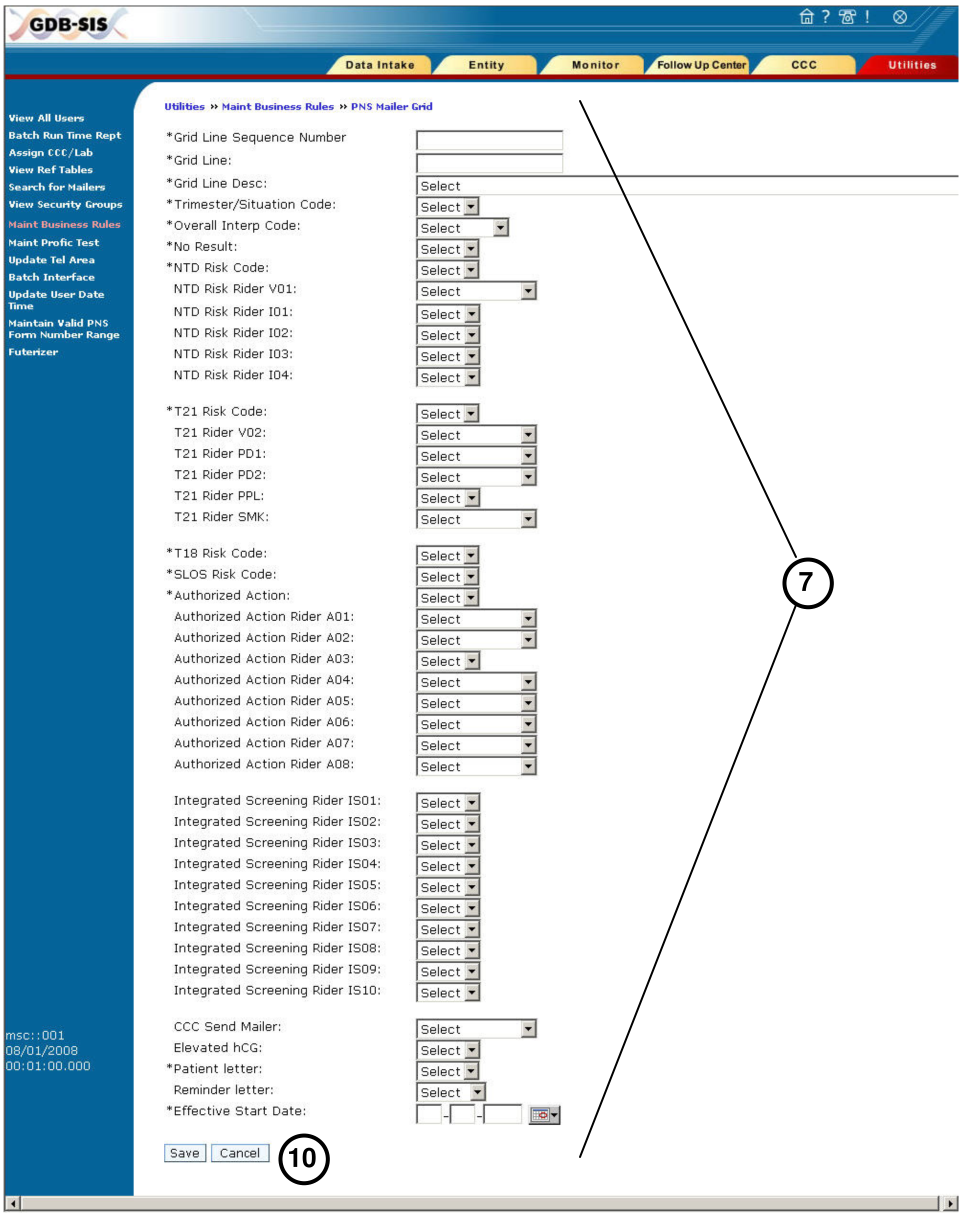


Figure 3 - PNS Mailer Grid - Add Mode

PNS Mailer Grid (continued)

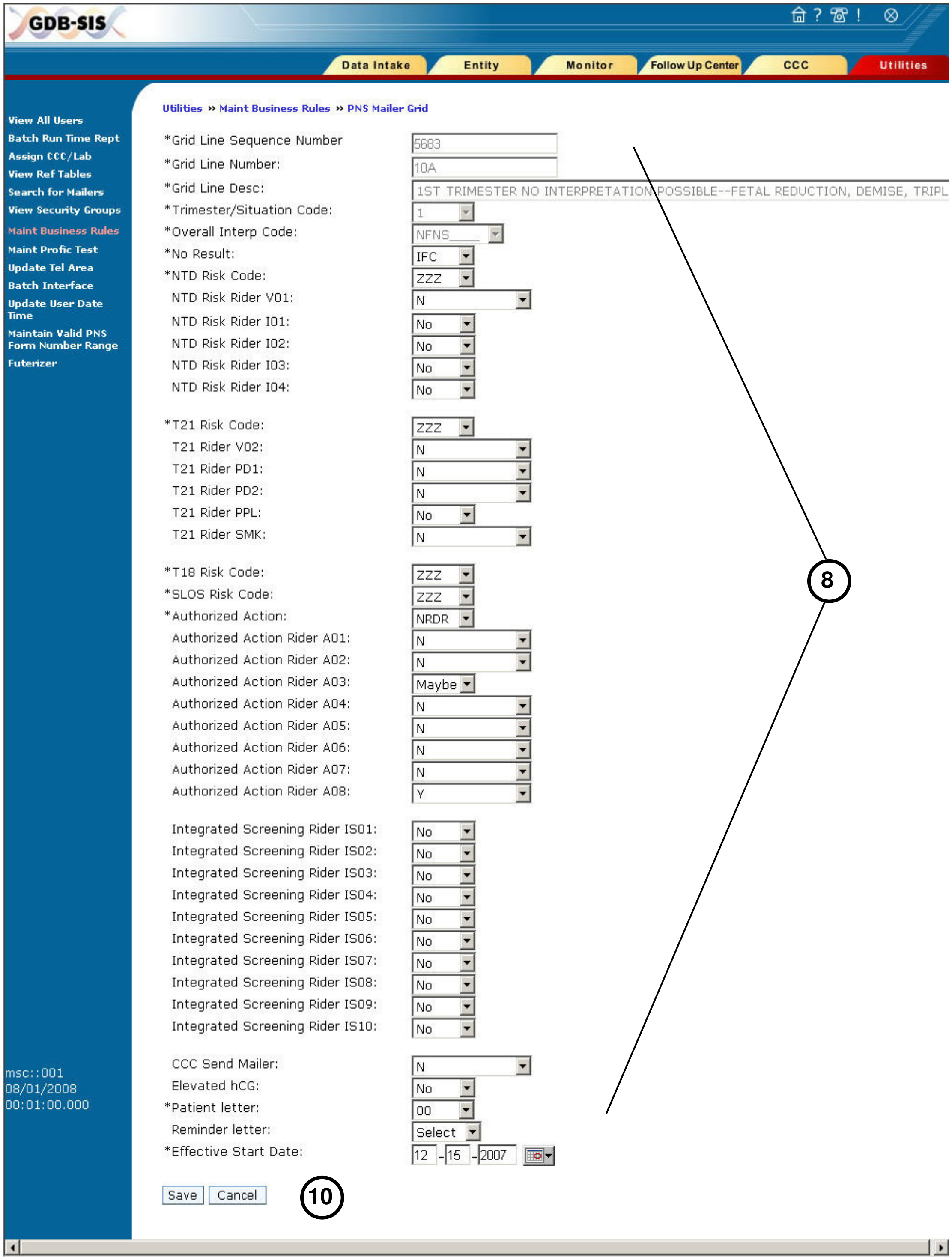


Figure 4 - PNS Mailer Grid - Update Mode (Single Row)

PNS Mailer Grid (continued)

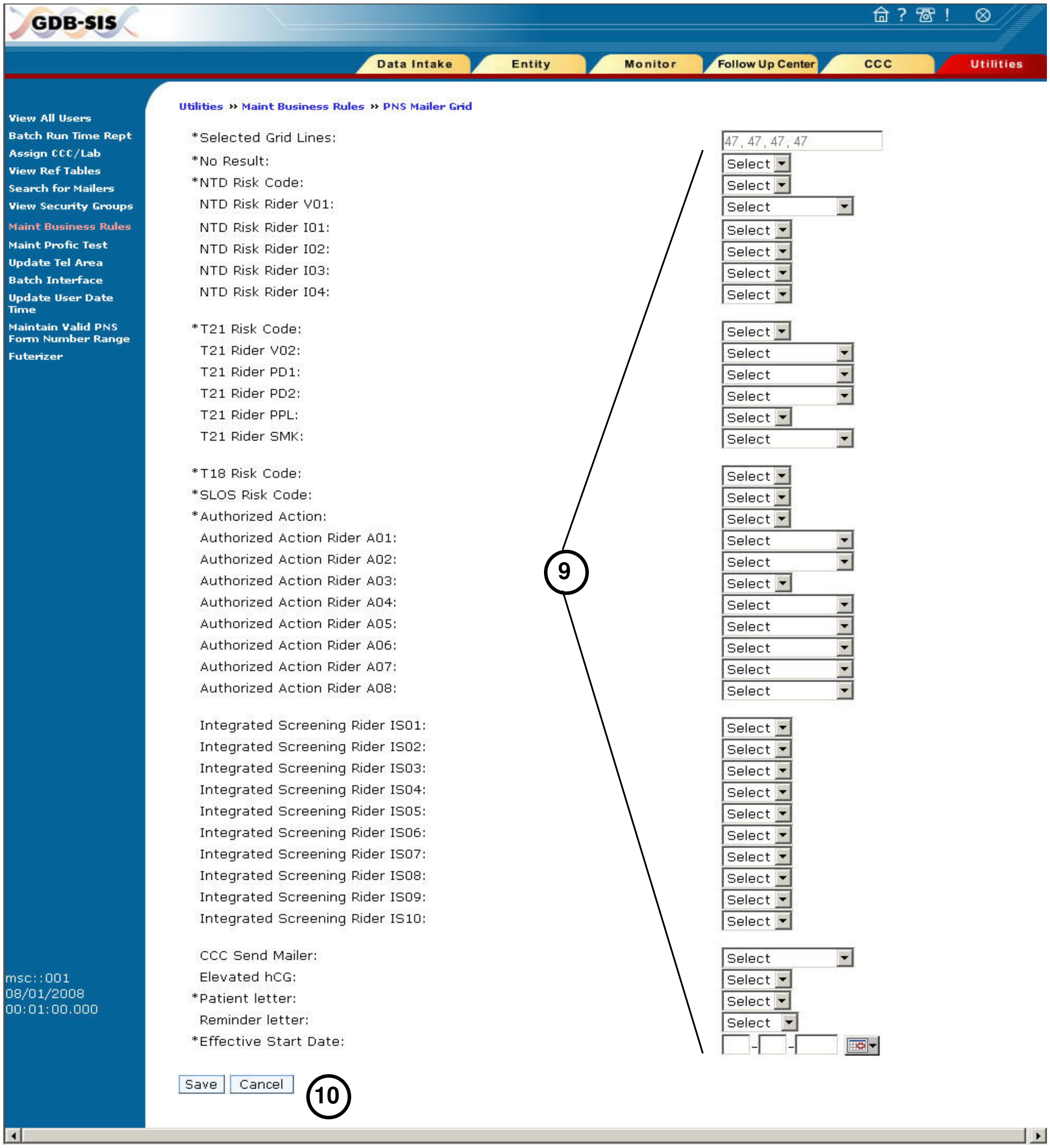


Figure 5 - PNS Mailer Grid - Update Mode (Multiple Rows)

7. The mailer grid fields are displayed for the selected record when you click the **Update** button (when single row is selected). The fields “Gridline Sequence Number”, “Gridline Number”, “Grid Line Desc”, “Trimester/ Situation Code”, “Overall Interp Code” are read only.
8. When you click the **Add** button, the above fields will be blank.

PNS Mailer Grid (continued)

9. When you click the **Update** button and when multiple rows are selected, then only the “Selected Grid Lines” field is populated. All other fields are blank.

10. **Buttons:**

    a. **Save** button, when updating a mailer grid record, saves any changes. When adding a new record, creates a new grid line record. If multiple gridlines are being updated, only those fields where the value entered by the user is not blank or ‘Select’ are updated.

    b. **Cancel** button cancels any unsaved changes, and the mailer grid is displayed (**see Figure 2**).

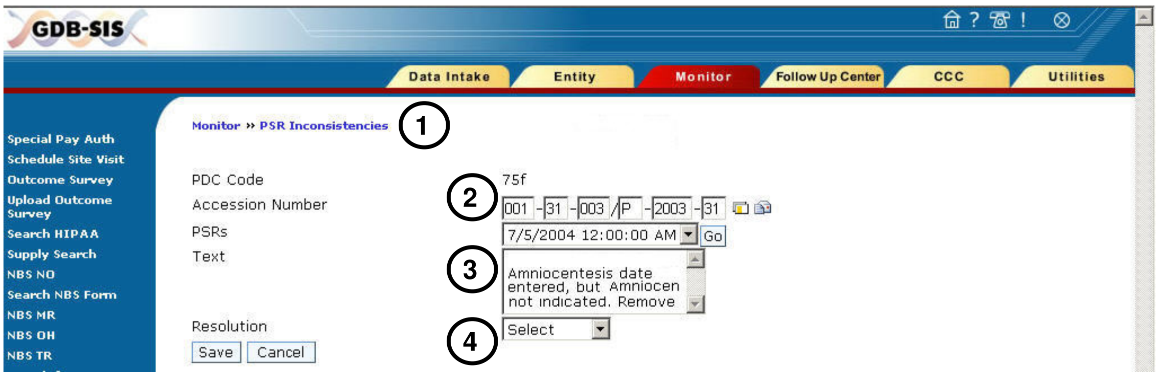
PSR Inconsistencies

Monitor >> PSR Inconsistencies

The **PSR Inconsistencies** screen (Figure 1) is used to view inconsistencies for a Patient Services Report (PSR) that has been entered by a Prenatal Diagnosis Center (PDC). When a PSR that has been submitted to SIS contains inconsistencies, an "Alert" message will be generated for the PSQA Monitor, who can view the inconsistencies from this screen. When you first view the inconsistency, it will be marked as unresolved.

Note: The invoice for a PSR will not be processed by GDB until all inconsistencies have been resolved or overridden. If the inconsistencies in the PSR are resolved the inconsistency will automatically be marked as resolved, and will disappear from the inconsistencies grid (see **FIGURE 2**). The PSQA Monitor may also choose to override inconsistencies. After all inconsistencies for a PSR have been resolved or overridden, the invoice processing through the Business Service System (BSS) will begin.

FIGURE 1



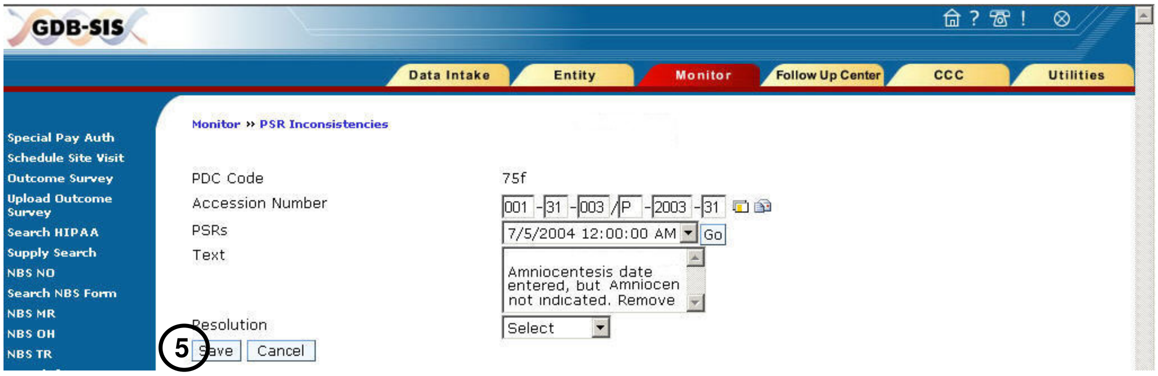
1. Navigation and screen name.
2. Information about the specific PSR with inconsistencies is displayed, including the **PDC Code** (read-only), **Accession Number,** and the date and time when the **PSR** was entered (read-only). The **Accession Number** may be copied or pasted using the icon next to the **Accession Number**. If you manually enter (or copy/paste) an Accession Number, click the **Go** button to view the inconsistency grid for the selected Accession Number (Figure 3).
3. The **Text** field displays the red text message for the inconsistency that was displayed (at the top of the screen) at the PDC and was not resolved by the user. Information in the **Text** field will be displayed in a read-only format.
4. The **Resolution** status dropdown is displayed below the PSR information once you have selected an inconsistency from the Inconsistency grid for editing (see #6). The dropdown choices are: "Resolved", "Unresolved" or "Overridden".

   If you resolve the inconsistencies in the PSR the inconsistency will automatically be marked as resolved, and will disappear from the inconsistencies grid (see **FIGURE 3)**.

   Note: It is not a recommended practice to manually mark an inconsistency as "Resolved".

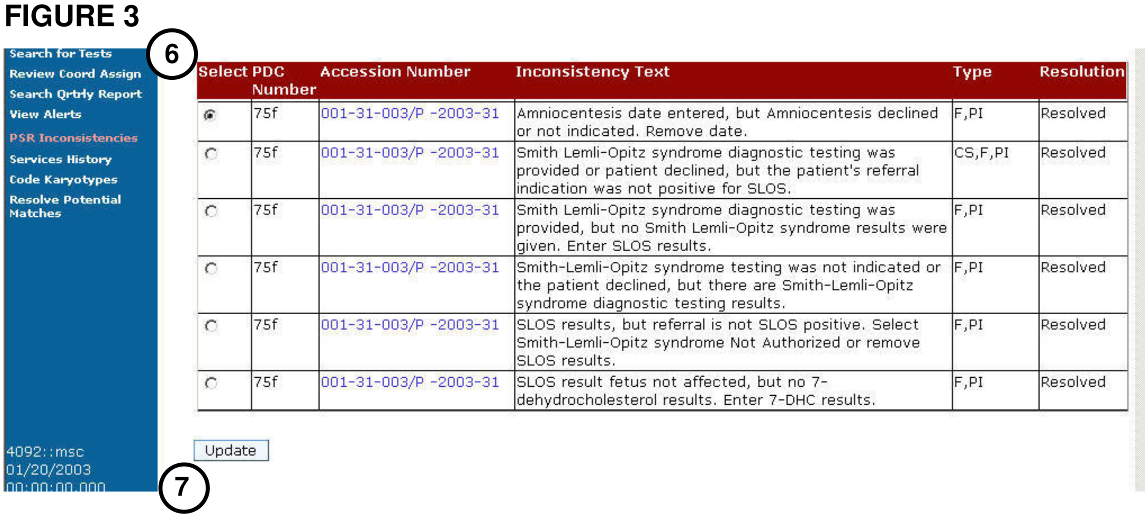
PSR Inconsistencies (continued)

FIGURE 2



5. **Buttons**:
    a. Click the **Save** button to save changes to the Resolution of the selected inconsistency.
    b. Click the **Cancel** button to discard any unsaved changes to the selected inconsistency.

FIGURE 3



Select	PDC Number	Accession Number	Inconsistency Text	Type	Resolution
◉	75f	001-31-003/P -2003-31	Amniocentesis date entered, but Amniocentesis declined or not indicated. Remove date.	F,PI	Resolved
○	75f	001-31-003/P -2003-31	Smith Lemli-Opitz syndrome diagnostic testing was provided or patient declined, but the patient's referral indication was not positive for SLOS.	CS,F,PI	Resolved
○	75f	001-31-003/P -2003-31	Smith Lemli-Opitz syndrome diagnostic testing was provided, but no Smith Lemli-Opitz syndrome results were given. Enter SLOS results.	F,PI	Resolved
○	75f	001-31-003/P -2003-31	Smith-Lemli-Opitz syndrome testing was not indicated or the patient declined, but there are Smith-Lemli-Opitz syndrome diagnostic testing results.	F,PI	Resolved
○	75f	001-31-003/P -2003-31	SLOS results, but referral is not SLOS positive. Select Smith-Lemli-Opitz syndrome Not Authorized or remove SLOS results.	F,PI	Resolved
○	75f	001-31-003/P -2003-31	SLOS result fetus not affected, but no 7-dehydrocholesterol results. Enter 7-DHC results.	F,PI	Resolved

6. The inconsistency grid displays all of the inconsistencies for a given PSR as well as the PDC Number. Accession Number, Inconsistency Text, Type and Resolution. Type Column displays the various ways the inconsistency could have been resolved.
    a. Form (F) means that the particular inconsistency is due to either missing or inconsistent information on a particular PSR screen. If the missing information is entered on the screen or the inconsistent information is removed, the red text message will not be displayed at the top of the screen.
    b. Case Record (CR) or Current Status (CS) means that the particular inconsistency is due to missing or inconsistent information with the Case Record or Current Status. The CCC should be contacted for specific information regarding what information is incorrect.

PSR Inconsistencies (continued)

c. Case Coordination Center (CCC) means that the particular inconsistency is due to information the CCC updated in the patient's case record but this new information is not reflected on the PSR.

d. Policy Issue (PI) means that GDB staff will need to assist the PDC in resolving the inconsistent information. All inconsistencies have Policy Issue as a Type.

The Resolution column displays the status of the inconsistencies for the GDB staff (PSQA Monitor). The choices under the Resolution column are "Unresolved", "Resolved", and "Overridden". Unresolved means the data needed to resolve the inconsistency is missing. The "Resolve" choice will automatically be used by SIS if missing information is entered or the inconsistent information is corrected; the record will disappear from the inconsistencies grid once the Resolved choice is selected. "Overridden" should only be used if the missing information is not required for payment of a follow-up service under the Prenatal Screening Program or is not necessary information.

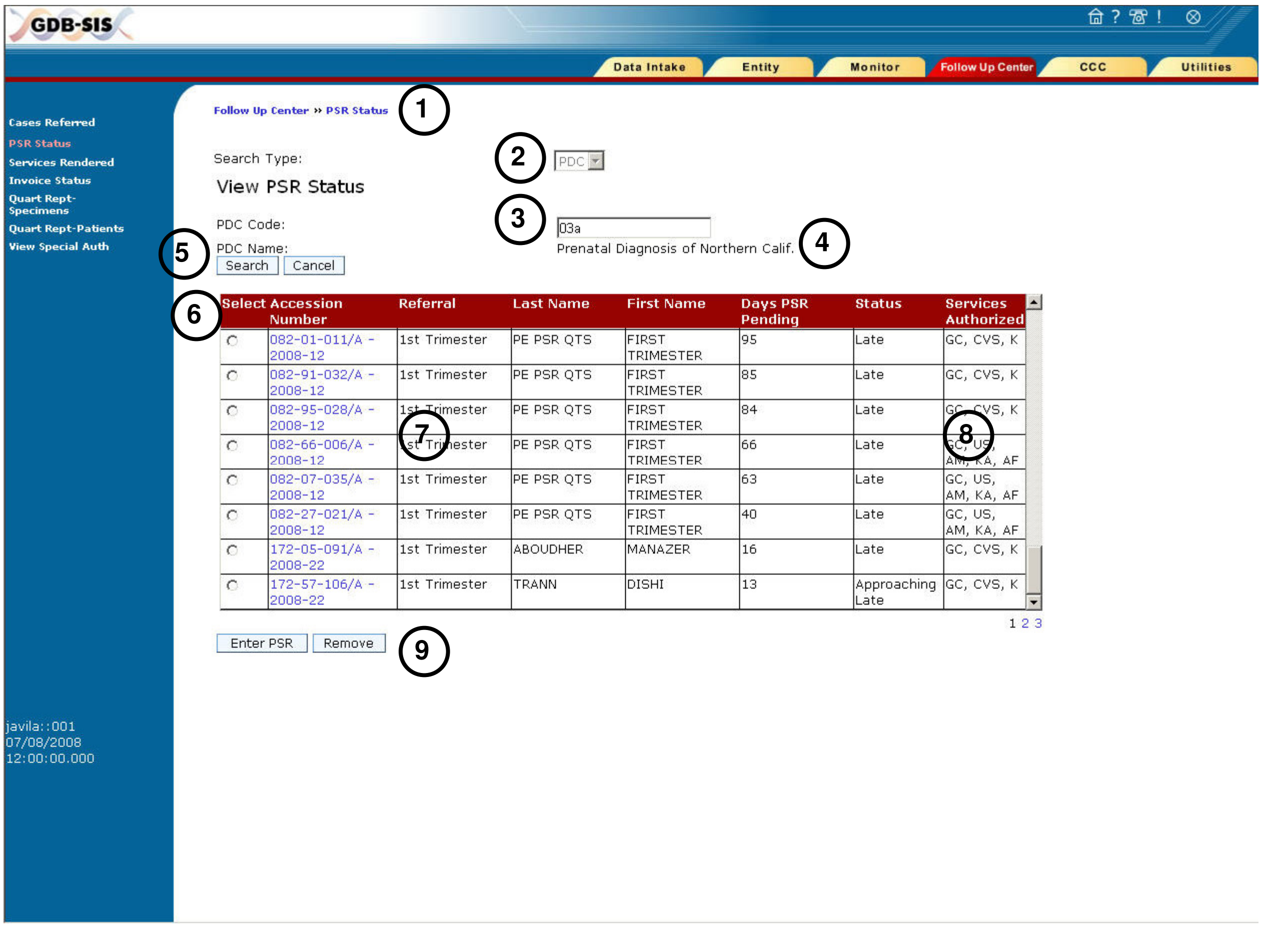
7. Click the radio button next to the inconsistency row displaying the inconsistency you would like to edit in the grid, then click the **Update** button to update the Resolution column for the selected inconsistency.

PSR Status

Follow Up Center >> PSR Status

This screen will allow you to view a list of Patient Services Reports (PSRs) with a status of "PSR needed", "Approaching Late", or "Late," for a PDC. This will allow the user to flag PSRs that may need priority attention.

Access to PSR Status information for a PDC is specific to your login ID. This screen was modified to incorporate case id related changes for post PEII cases.



1. Navigation and screen name.
2. Search Type.
3. For PDC users the **PDC Code** field will be pre-populated with your PDC information. If the field is not pre-populated, you must enter a **PDC Code**.
4. The **PDC Name** is displayed.
5. **Buttons:**
   a. **Search** – returns all PSRs for the PDC with a status of "PSR Needed", "Approaching Late," or "Late"
   b. **Cancel** – clears the **PDC Code** field.

PSR Status (continued)

6. The PSR status grid displays all PSRs for your PDC with a status of "PSR Needed", "Approaching Late", or "Late". Clicking the accession number will display the Case Summary (PNS) screen. The "Days PSR Pending" column displays the number of days a PSR has been pending (calculated from the date the appointment status was changed to "Kept" or "GC Appt Kept - Dx Not Scheduled" on the **Appointments** screen and the trimester).

   1st Trimester case with appointment status "GC Appt Kept - Dx Not Scheduled" :
   a. PSR status will be "PSR Needed" 0-2 days between appointment "GC Appt Kept - Dx Not Scheduled" and the present date.
   b. PSR status will be "Approaching Late" 3-6 days between appointment "GC Appt Kept - Dx Not Scheduled" and the present date.
   c. PSR status will be "Late" after 7 or more days from appointment "GC Appt Kept - Dx Not Scheduled".

   1st Trimester case with appointment status "Kept":
   a. PSR status will be "PSR Needed" 0-7 days between appointment "Kept" and the present date.
   b. PSR status will be "Approaching Late" 8-14 days between appointment "Kept" and the present date.
   c. PSR status will be "Late" after 15 or more days from appointment "Kept".

   2nd Trimester case with appointment status "Kept":
   a. PSR status will be "PSR Needed" 0-29 days between appointment "Kept" and the present date.
   b. PSR status will be "Approaching Late" 30-44 days between appointment "Kept" and the present date.
   c. PSR status will be "Late" after 45 or more days from appointment "Kept".

   Click a radio button on the PSR status grid, then click the **Enter PSR** button to enter PSR information for the selected case or you can click on the accession number for a particular patient in the PSR Status grid which takes you to the **Case Summary (PNS)** screen. On this screen there is an "Enter PSR" link on the top right corner of the screen.

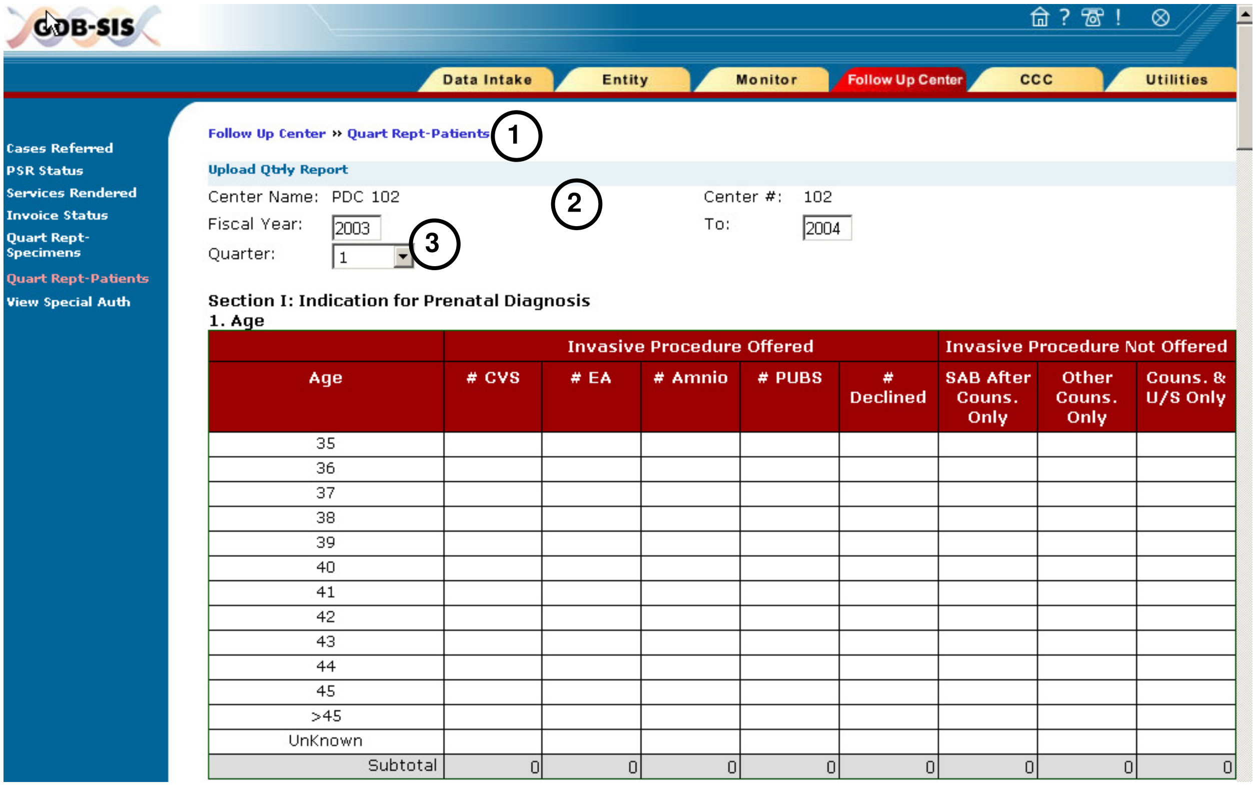
7. **Referral** column will display case trimester as either "**1st Trimester**" or "**2nd Trimester**".
8. **Services Authorized** column will show services authorized for the case for the selected PDC. The services listed here will be same as shown on Cases Referred screen with following exceptions:
   a. If the "GC Appointment Kept. Dx Not Scheduled" status is selected, the services authorized will include GC only.
   b. Once appointment status is changed to "Kept", all authorized services will be listed in the Services Authorized column.
9. **Buttons:**
   a. The **Enter PSR** button will take you to the Enter PSR screen.
   b. The **Remove** button will remove selected case from pending PSR list.

Quarterly Report – Patients

Follow Up Center >> Quart Rept-Patients

The **Quarterly Rept-Patients** screen is used to enter PDC quarterly reports for non-prenatal screening (non-XAFP) patients.

FIGURE 1



1. Navigation and screen name.
2. **Center Name** and **Center #** are read-only, based on your log in ID and associated facility.
3. You must identify a **Fiscal Year** and **Quarter** for the data contained in the report. Only one report can be submitted for each Fiscal Year/Quarter (i.e. Fiscal Year is 2003 to 2004 in Quarter 1).

   Quarter 1 is July –September

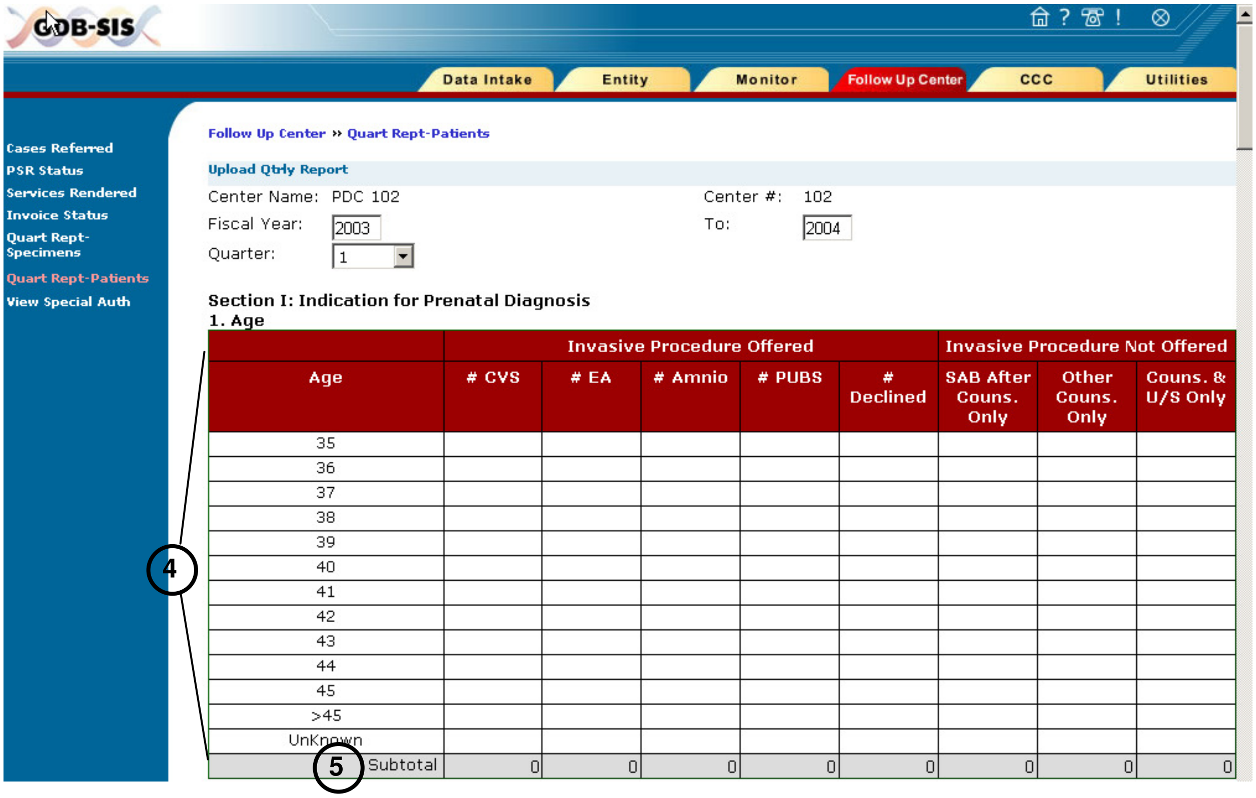
   Quarter 2 is October – December

   Quarter 3 is January – March

   Quarter 4 is April – June

Quarterly Report – Patients (continued)

FIGURE 2



4. Spreadsheet: The spreadsheet area is used to enter numbers of non-prenatal screening (non-XAFP) patients. Only integers may be used (i.e. an entry of 4.5 is not allowed).

   The fields mentioned below were recently added to this spreadsheet:

   • Mitochondrial disorders in the “Other Heritable Disorders” Section.

   • LargeNT in the "Other Indication for Counseling or Prenatal Services" Section.

   • A new "Group Counseling" section was created including the “Number of Sessions” and “Number of women at Sessions” fields.

5. SIS will automatically calculate **Subtotals** for the sections that have a Subtotal row. The **Sum of the subtotals** and the **Grand total** are located on end **Section I: Indication for Prenatal Diagnosis** below table **5. Unknown Indication** (Figure 4).

Quarterly Report – Patients (continued)

FIGURE 3

4

2. Maternal Concern

	Invasive Procedure Offered					Invasive Procedure Not Offered		
	# CVS	# EA	# Amnio	# PUBS	# Declined	SAB After Couns. Only	Other Couns. Only	Couns. & U/S Only
Maternal Concern								
Subtotal	0	0	0	0	0	0	0	0

3. Family History

a. Chromosome Abnormality

	Invasive Procedure Offered					Invasive Procedure Not Offered		
	# CVS	# EA	# Amnio	# PUBS	# Declined	SAB After Couns. Only	Other Couns. Only	Couns. & U/S Only
Down Syndrome								
Trisomy 13								
Trisomy 18								
Chrom. Abn. in Parent								
Other								
Subtotal	0	0	0	0	0	0	0	0

b. NTD (Non-AFP referrals)

	Invasive Procedure Offered					Invasive Procedure Not Offered		
	# CVS	# EA	# Amnio	# PUBS	# Declined	SAB After Couns. Only	Other Couns. Only	Couns. & U/S Only
NTD (Non-AFP referrals)								
Subtotal	0	0	0	0	0	0	0	0

c. X-Linked

	Invasive Procedure Offered					Invasive Procedure Not Offered		
	# CVS	# EA	# Amnio	# PUBS	# Declined	SAB After Couns. Only	Other Couns. Only	Couns. & U/S Only
Fragile X Syndrome								
Other								
Subtotal	0	0	0	0	0	0	0	0

Parental or Fetal for X-linked History

	Biochemical	DNA
Fragile X Syndrome		
Other		

d. Family History or at Risk for:
1. Hemoglobinopathies

	Invasive Procedure Offered					Invasive Procedure Not Offered		
	# CVS	# EA	# Amnio	# PUBS	# Declined	SAB After Couns. Only	Other Couns. Only	Couns. & U/S Only
Hemoglobinopathies								
Subtotal	0	0	0	0	0	0	0	0

Parental or Fetal - Family History or at Risk for Hemoglobinopathies

	Biochemical	DNA
Hemoglobinopathies		

Quarterly Report – Patients (continued)

FIGURE 4

4

2. Metabolic/Recessive or Dominant Disorders (other than Hemoglobinopathies)

	Invasive Procedure Offered					Invasive Procedure Not Offered		
	# CVS	# EA	# Amnio	# PUBS	# Declined	SAB After Couns. Only	Other Couns. Only	Couns. & U/S Only
Tay Sachs Disease								
Cystic Fibrosis								
Other								
Subtotal	0	0	0	0	0	0	0	0

Parental or Fetal - Family History or at Risk for Metabolic/Recessive or Dominant Disorders (other than Hemoglobinopathies)

	Biochemical	DNA
Tay Sachs Disease:		
Cystic Fibrosis:		
Other:		

3. Other Heritable Disorders

	Invasive Procedure Offered					Invasive Procedure Not Offered		
	# CVS	# EA	# Amnio	# PUBS	# Declined	SAB After Couns. Only	Other Couns. Only	Couns. & U/S Only
Other Heritable Disorders								
Mitochondrial Disorders								
Subtotal	0	0	0	0	0	0	0	0

4. Other Indication for Counseling or Prenatal Services

	Invasive Procedure Offered					Invasive Procedure Not Offered		
	# CVS	# EA	# Amnio	# PUBS	# Declined	SAB After Couns. Only	Other Couns. Only	Couns. & U/S Only
a. Abnormal Ultrasound								
b. Teratogen Exposure								
c. Multiple Miscarriages								
d. Non-XAFP Multiple Marker								
e. LargeNT								
f. Other								
Subtotal	0	0	0	0	0	0	0	0

5. Unknown Indication

	Invasive Procedure Offered					Invasive Procedure Not Offered		
	# CVS	# EA	# Amnio	# PUBS	# Declined	SAB After Couns. Only	Other Couns. Only	Couns. & U/S Only
Unknown Indication								
Subtotal	0	0	0	0	0	0	0	0

Sum of Subtotals	0	0	0	0	0	0	0	0
					GRAND TOTAL			**0**

Section II: Repeat Samples

# of Amnios for Non-Growth	# of Amnios for CVS Culture Failure	# of Confirming PUBS	# of Repeat Samples for Other Indications

Quarterly Report – Patients (continued)

FIGURE 5

6848::pdc028
01/15/2004
00:00:00.000

Section III: Demographic Information on All Patients Served

1 Race/Ethnicity

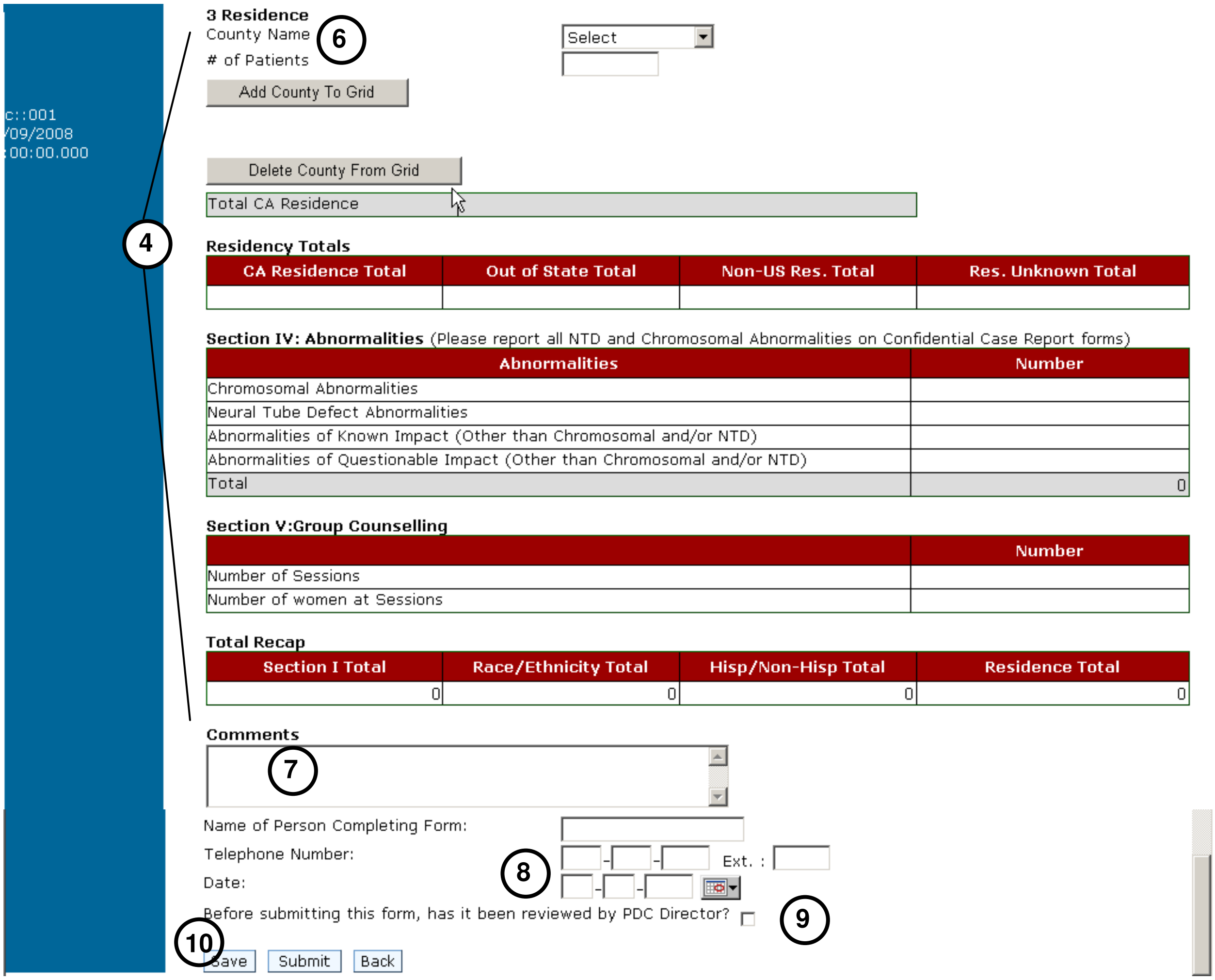
Race/Ethnicity	Total
White	
Black	
Native American	
Middle Eastern	
Asian Indian	
Cambodian	
Laotian	
Vietnamese	
Other SE Asian	
Filipino	
Samoan	
Hawaiian	
Guamanian	
Chinese	
Japanese	
Korean	
Other Asian/Pacific Islander	
Other	
Unknown	
Total Race/Ethnicity	0

2 Hispanic Origin

Origin	Total
Hispanic	
Non-Hispanic	
Unknown	
Total Hisp/Non-Hisp	0

Quarterly Report – Patients (continued)

FIGURE 6



6. **Under 3. Residence** (County Name and Number of Patients)

   a. To Add a County: Click on the “Select” box for a dropdown list counties and select the county you want. Enter the number of patients in the textbox. Click on the “Add County to Grid” button.

   b. To Delete a County: Click on the checkbox next to the county you want to delete then click on the “Delete County from Grid” button.

   c. To Change the number of patients within a county: You must first delete the county within the grid (See 4b. above for deleting a county). You then must re-add this county again with the correct number of patients. (See 6a above for adding a county.)

Quarterly Report – Patients (continued)

Note: SIS will automatically total the number of patients you have added to each county and place this total in the **Total CA Residence** grid bar. Under **Total CA**

Residence grid bar there is the **Residency Totals**. Within the Residency Totals table, CA Residence Total will be populated automatically with the total from the Total CA Residence grid bar. However, it is the PDC's responsibility to enter the number of patients for the **Out of State Total**, **Non-US Res. Total** and **Res. Unknown Total**.

Note: Under the **Total Recap** table, the totals in **Section I.**, **Race**/**Ethnicity**, **Hisp**/**Non-Hisp**, and **Residence** should match.

7. **Comments**: A text box is provided for comments. Only comments related to quarterly report data should be added here. Other information (such as PDC staff changes for example) should not be communicated using the comments field.
8. Contact Information of the person completing the form should be entered along with the date.
9. Review confirmation is required. You must check this box to confirm that the PDC Director has reviewed this report before submitting it to GDB.
10. **Buttons**:
    a. **Save** – retains the entered data. The report may be saved as many times as desired before submission. You may save the data and log out of SIS. When you return, you may continue entering data on the screen at the point you logged out. Only one report per quarter for each fiscal year may be saved.

    When you click the **Save** button, if the numbers under the **Total Recap** are not same the following warning message will appear "Your "Grand Total', 'Total Race/Ethnicity', 'Total Hisp/Non-Hisp', and 'Total Residence' differs. Do you want to Save?" When this warning appears, you have the option of clicking on the **Ok** or **Cancel** buttons. When you click the **Ok** button, the data you entered on the screen will be saved. You need to go back and check the numbers under each section to make certain that they match. If they do not match, correct the numbers and again click on the **Save** button. If you click the **Cancel** button on this warning message, your data will not be saved but may continue data entry.

    b. **Submit**- sends the report to GDB electronically. Note that data on this Quarterly report cannot be changed after clicking on the **Submit** button.

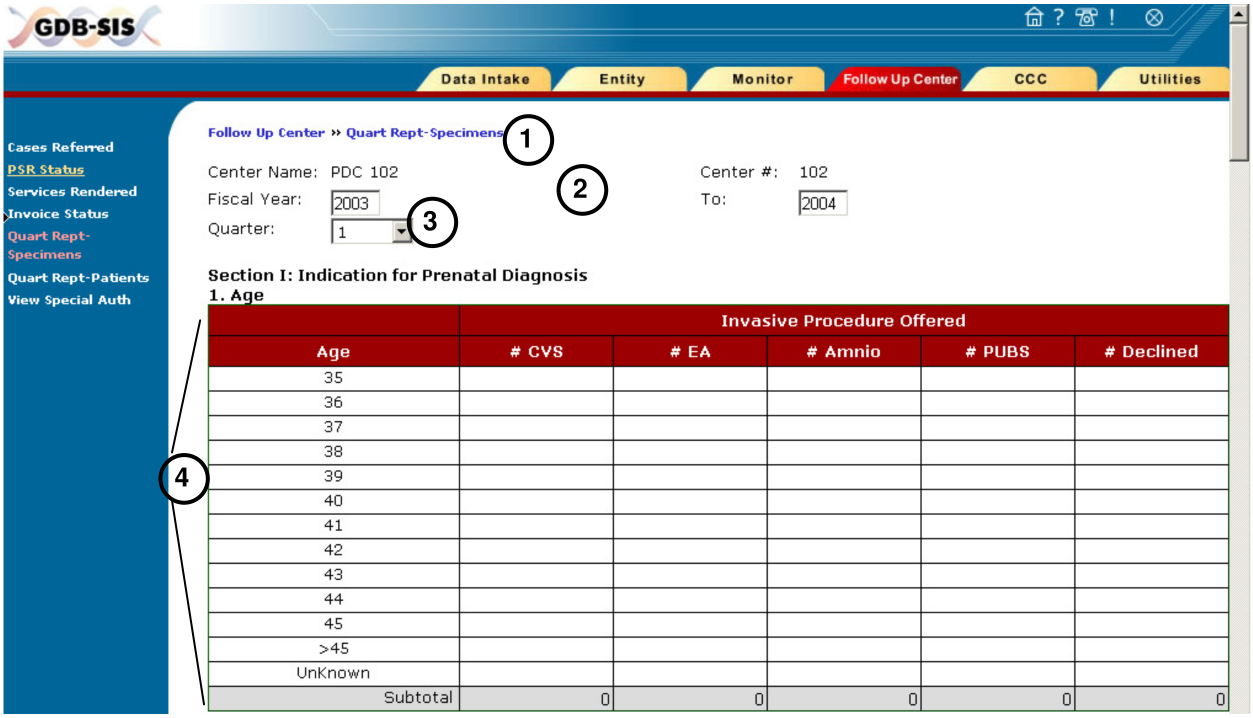
    c. **Back** – returns the user to the previous SIS screen, discarding any changes that have not been saved.

Quarterly Report – Specimens

Follow Up Center >> Quart Rept-Specimens

The **Quart Rept-Specimens** screen allows users to enter quarterly reports for outside specimens.

FIGURE 1



1. Navigation and screen name.
2. **Center Name** and **Center #** are read-only, based on your log in ID and associated facility.
3. You must identify a **Fiscal Year** and **Quarter** for the data contained in the report. Only one report can be submitted for each Fiscal Year/Quarter (i.e. Fiscal Year is 2003 to 2004 in Quarter 1).

   Quarter 1 is July –September

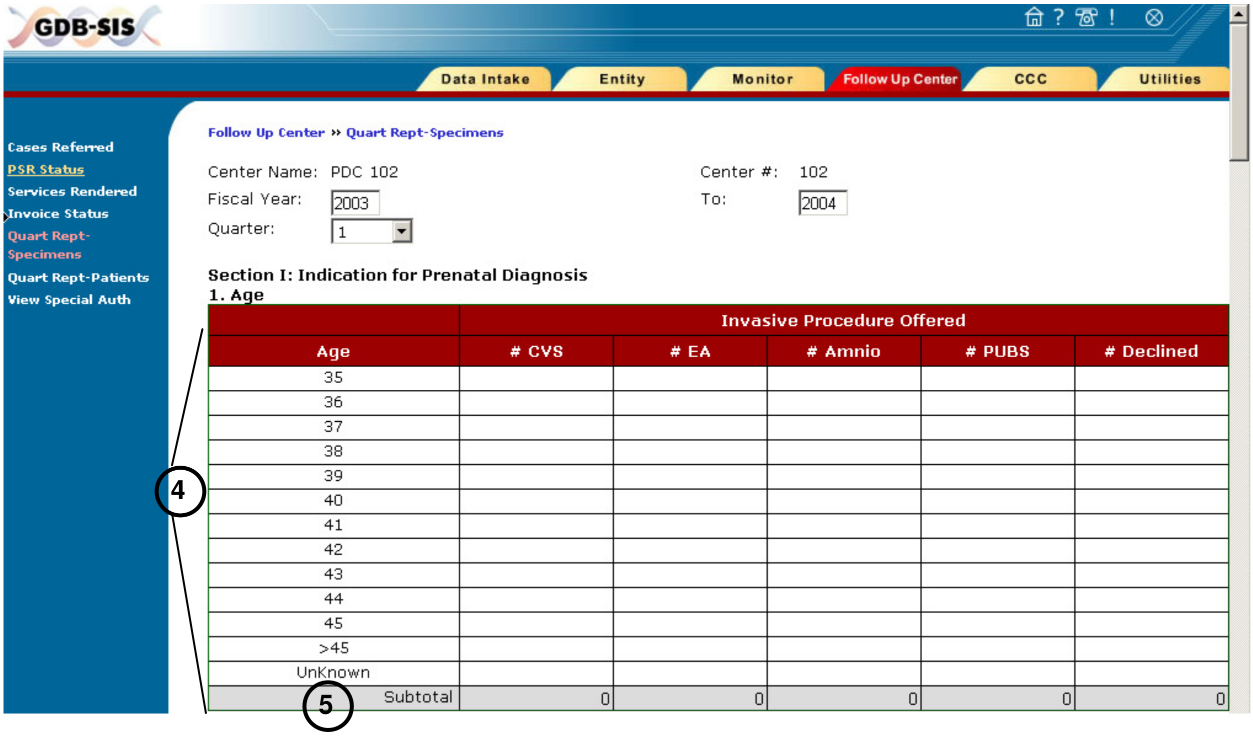
   Quarter 2 is October – December

   Quarter 3 is January – March

   Quarter 4 is April – June
4. Spreadsheet – The spreadsheet area is used to enter numbers of Outside Specimens. Only integers may be used (i.e. an entry of 4.5 is not allowed).

Quarterly Report – Specimens (continued)

FIGURE 2



The fields mentioned below were recently added to this spreadsheet:

• Mitochondrial disorders in the "Other Heritable Disorders" Section.

• LargeNT in the "Other Indication for Counseling or Prenatal Services" Section.

5. SIS will automatically calculate **Subtotals** for the sections that have a Subtotal row. The **Sum of the subtotals** and the **Grand total** are located on end **Section I: Indication for Prenatal Diagnosis** below table **5. Unknown Indication** (Figure 4).

Quarterly Report – Specimens (continued)

FIGURE 3

4

2. Maternal Concern

	Invasive Procedure Offered				
	# CVS	# EA	# Amnio	# PUBS	# Declined
Subtotal	0	0	0	0	0

3. Family History

a. Chromosome Abnormality

	Invasive Procedure Offered				
	# CVS	# EA	# Amnio	# PUBS	# Declined
Down Syndrome					
Trisomy 13					
Trisomy 18					
Chrom. Abn. in Parent					
Other					
Subtotal	0	0	0	0	0

b. NTD (Non-AFP referrals)

	Invasive Procedure Offered				
	# CVS	# EA	# Amnio	# PUBS	# Declined
NTD (Non-AFP referrals)					
Subtotal	0	0	0	0	0

c. X-Linked

	Invasive Procedure Offered				
	# CVS	# EA	# Amnio	# PUBS	# Declined
Fragile X Syndrome					
Other					
Subtotal	0	0	0	0	0

Parental or Fetal for X-linked History

	Biochemical	DNA
Fragile X Syndrome		
Other		

d. Family History or at Risk for:
1. Hemoglobinopathies

	Invasive Procedure Offered				
	# CVS	# EA	# Amnio	# PUBS	# Declined
Hemoglobinopathies					
Subtotal	0	0	0	0	0

Parental or Fetal - Family History or at Risk for Hemoglobinopathies

	Biochemical	DNA
Hemoglobinopathies		

Quarterly Report – Specimens (continued)

FIGURE 4

4

2. Metabolic/Recessive or Dominant Disorders (other than Hemoglobinopathies)

	Invasive Procedure Offered				
	# CVS	# EA	# Amnio	# PUBS	# Declined
Tay Sachs Disease					
Cystic Fibrosis					
Other					
Subtotal	0	0	0	0	0

Parental or Fetal - Family History or at Risk for Metabolic/Recessive or Dominant Disorders (other than Hemoglobinopathies)

	Biochemical	DNA
Tay Sachs Disease:		
Cystic Fibrosis:		
Other:		

3. Other Heritable Disorders

	Invasive Procedure Offered				
	# CVS	# EA	# Amnio	# PUBS	# Declined
Other Heritable Disorders					
Mitochondrial Disorders					
Subtotal	0	0	0	0	0

4. Other Indication for Counseling or Prenatal Services

	Invasive Procedure Offered				
	# CVS	# EA	# Amnio	# PUBS	# Declined
a. Abnormal Ultrasound					
b. Teratogen Exposure					
c. Multiple Miscarriages					
d. Non-XAFP Multiple Marker					
e. Large NT					
f. Other					
Subtotal	0	0	0	0	0

5. Unknown Indication

	Invasive Procedure Offered				
	# CVS	# EA	# Amnio	# PUBS	# Declined
Unknown Indication					
Subtotal	0	0	0	0	0

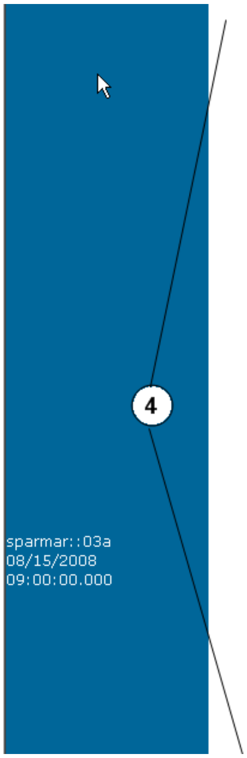
Sum of Subtotals	0	0	0	0	0
				GRAND TOTAL	**0**

Section II: Repeat Samples

# of Amnios for Non-Growth	# of Amnios for CVS Culture Failure	# of Confirming PUBS	# of Repeat Samples for Other Indications

Quarterly Report – Specimens (continued)

FIGURE 5



Section III: Demographic Information on All Patients Served

1 Race/Ethnicity

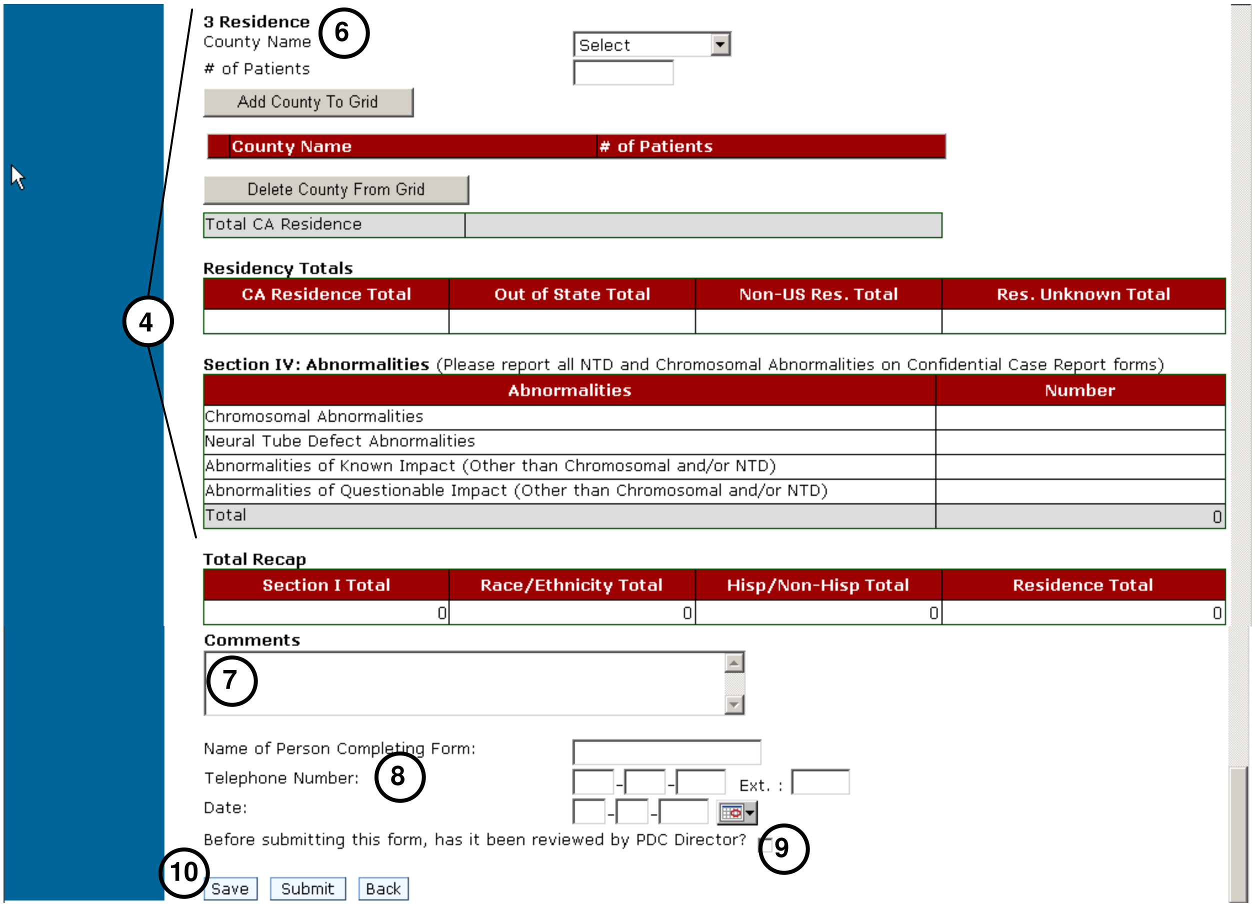
Race/Ethnicity	Total
White	
Black	
Native American	
Middle Eastern	
Asian Indian	
Cambodian	
Laotian	
Vietnamese	
Other SE Asian	
Filipino	
Samoan	
Hawaiian	
Guamanian	
Chinese	
Japanese	
Korean	
Other Asian/Pacific Islander	
Other	
Unknown	
Total Race/Ethnicity	0

2 Hispanic Origin

Origin	Total
Hispanic	
Non-Hispanic	
Unknown	
Total Hisp/Non-Hisp	0

Quarterly Report – Specimens (continued)

FIGURE 6



6. **Under 3. Residence** (County Name and Number of Patients)

   a. To Add a County: Click on the “Select” box for a dropdown list counties and select the county you want. Enter the number of patients in the textbox. Click on the “Add County to Grid” button.

   b. To Delete a County: Click on the checkbox next to the county you want to delete then click on the “Delete County from Grid” button.

   c. To Change the number of patients within a county: You must first delete the county within the grid (See 4b. above for deleting a county). You then must re-add this county again with the correct number of patients (See 6a. above for adding a county).

Quarterly Report – Specimens (continued)

Note: SIS will automatically total the number of patients you have added to each county and place this total in the **Total CA Residence** grid bar. Under **Total CA Residence** grid bar there is the **Residency Totals**. Within the Residency Totals table, CA Residence Total will be populated automatically with the total from the Total CA Residence grid bar. However, it is the PDC's responsibility to enter the number of patients for the **Out of State Total**, **Non-US Res. Total** and **Res. Unknown Total**.

Note: Under the **Total Recap** table, the totals in **Section I.**, **Race**/**Ethnicity**, **Hisp**/**Non-Hisp**, and **Residence** should match.

7. **Comments**: A text box is provided for comments.
8. Contact Information of person completing the form should be entered along with the date.
9. Review confirmation is required. You must check this box to confirm that the PDC Director has reviewed this report before submitting it to GDB.
10. **Buttons**:
    a. **Save** – retains the entered data. The report may be saved as many times as desired before submission. You may save the data and log out of SIS. When you return, you may continue entering data on the screen at the point you logged out. Only one report per quarter for each fiscal year may be saved.

       When you click the **Save** button, if the numbers under the **Total Recap** are not same the following warning message will appear "Your "Grand Total', 'Total Race/Ethnicity', 'Total Hisp/Non-Hisp', and 'Total Residence' differs. Do you want to Save?" When this warning appears, you have the option of clicking on the **Ok** or **Cancel** buttons. When you click the **Ok** button, the data you entered on the screen will be saved. You need to go back and check the numbers under each section to make certain that they match. If they do not match, correct the numbers and click on the **Save** button again. If you click the **Cancel** button on this warning message, your data will not be saved, but you may continue do data entry.

    b. **Submit**- sends the report to GDB electronically. Note that data on this Quarterly report cannot be changed after clicking on the **Submit** button.

    c. **Back –** returns the user to the previous SIS screen discarding any changes that have not been saved.

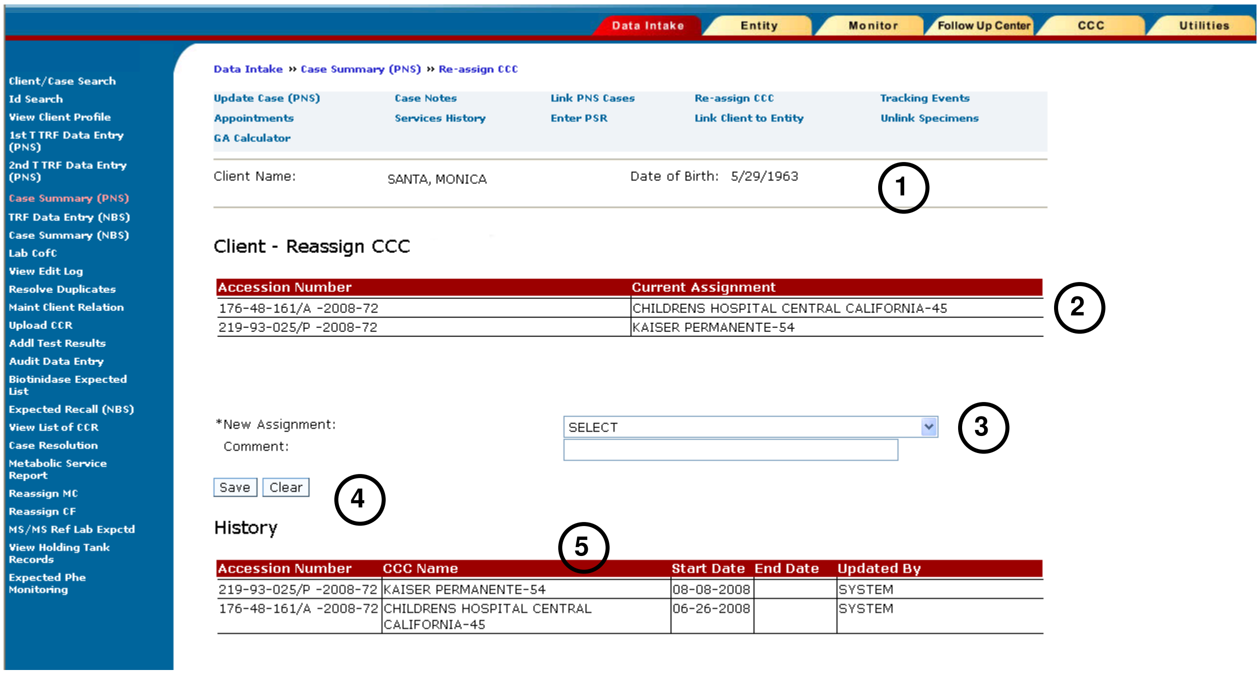
Reassign CCC

Data Intake >> Case Summary (PNS) >> Re-assign CCC

<u>OR</u>

Data Intake >> Case Summary (NBS) >> Re-assign CCC

The **Re-assign CCC** screen displays the current Case Coordination Center (CCC) assigned to a client. This screen also allows the user to change which CCC is assigned to a client.



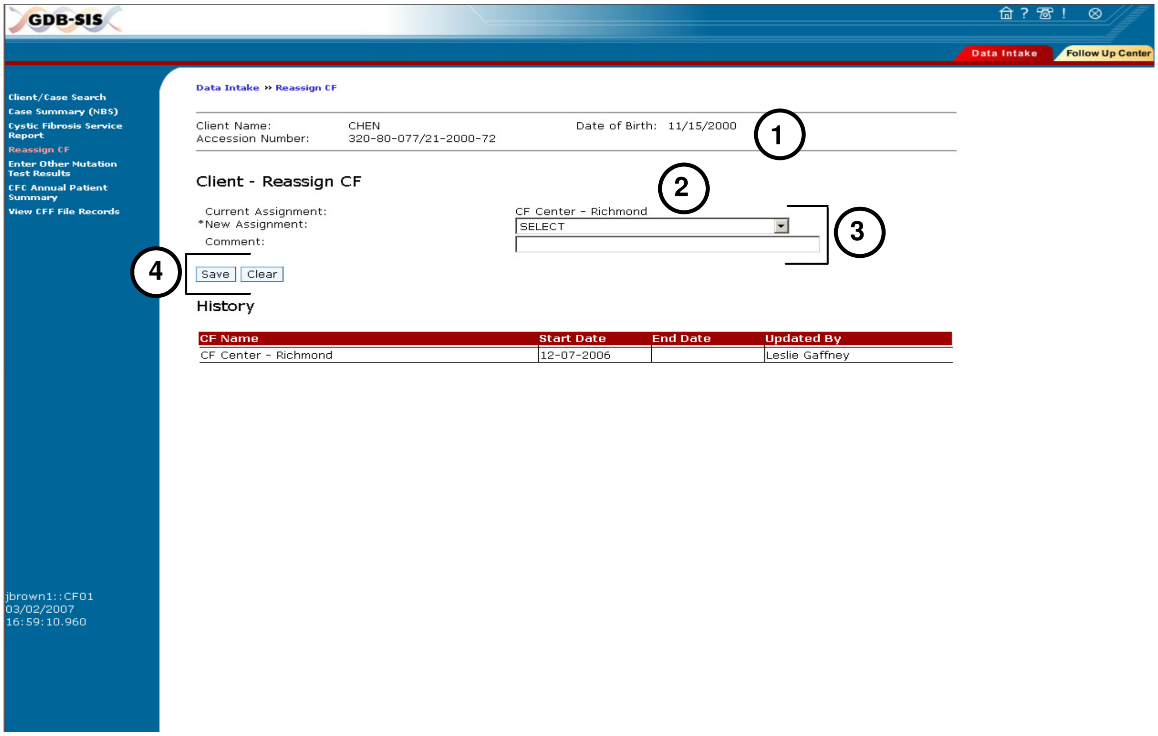
1. Client information is displayed in a read-only format, based on the client profile.
2. **Current Assignment** is displayed in a read-only format with all the accession numbers for the case.
3. Select the new CCC in the **New Assignment** field. This is a required field. Notes or comments can be entered into the **Comment** field. When a New CCC is selected, all of the specimens for that case will be transferred to that CCC.
4. **Buttons:**
    a. **Save** – Saves the new CCC assignment. If the client is a Headline Case, then it will appear on the new CCCs Headline Case screen.
    b. **Clear** – clears the fields, discarding any unsaved data.
5. The **History** table shows a list of CCCs the client has been assigned to in the past with all the accession numbers for the case. Start Date, End Date, and Updated By fields are recorded automatically by SIS.

Reassign CF Center

Data Intake >> Reassign CF

The screen allows a user to reassign a cystic fibrosis case to another CF Center.

FIGURE 1



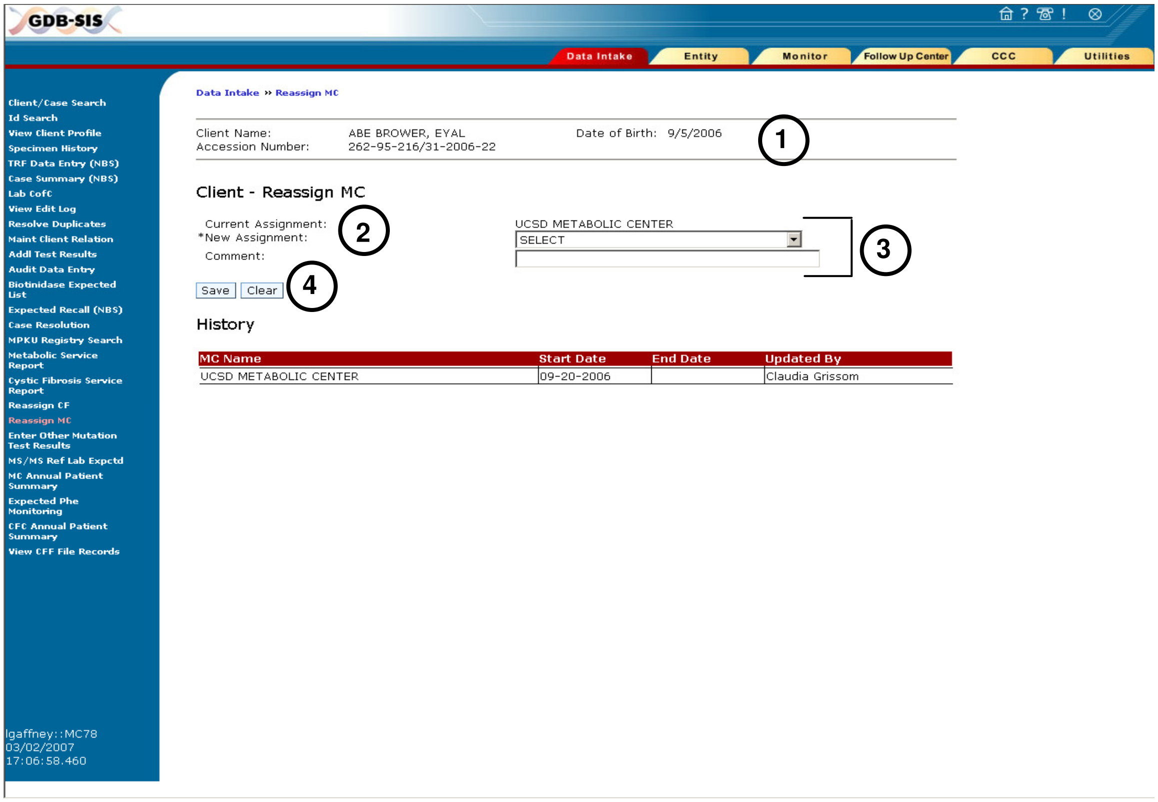
1. Displays client and case information in read-only format.
2. Displays the CF center to which the case is currently assigned in the **Current Assignment** field.
3. Select the new CF Center to which the case is assigned from the **New Assignment** list and enter any **Comments** related to the new assignment as required.
4. **Buttons**:
   a. **Save:** Saves the record and does the following:
      i. Places an End Date in the **History** grid for the old CF Center assignment
      ii. Adds a new record to the **History** grid for the new CF Center assignment.
      iii. Updates the **Current Assignment**
      iv. Clears the **New Assignment** and **Comments** fields.
   b. **Clear:** Clears the **New Assignment** and **Comments** fields without saving the changes.

Reassign Metabolic Center

Data Intake >> Reassign MC

This screen allows a user to reassign a metabolic case to another Metabolic Center.

FIGURE 1

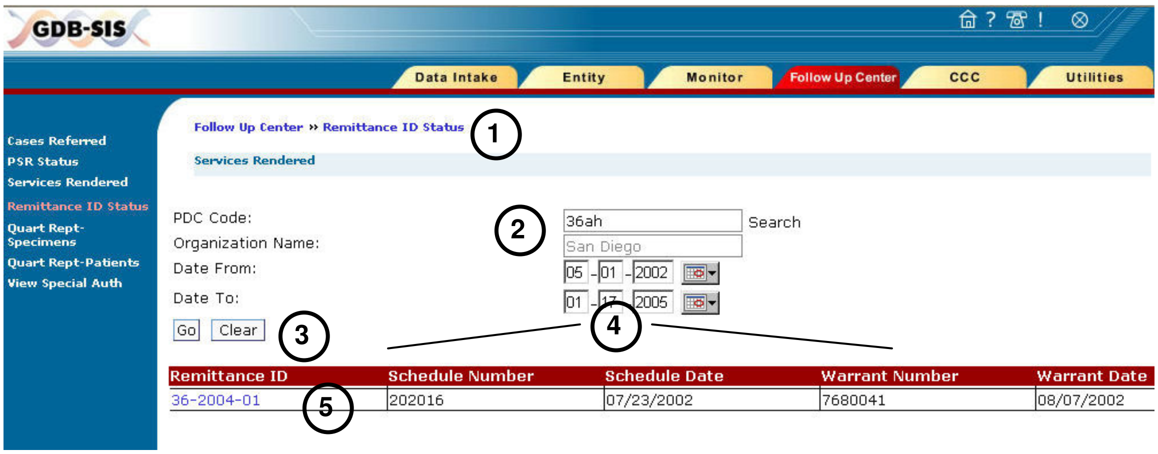


1. Displays client and case information in read-only format.
2. Displays the metabolic center to which the case is currently assigned in the **Current Assignment** field.
3. Select the new metabolic center to which the case is assigned from the **New Assignment** list and enter any **Comments** related to the new assignment as required.
4. **Buttons**:
   a. **Save:** Saves the record and does the following:
      i. Places an End Date in the **History** grid for the old metabolic center assignment
      ii. Adds a new record to the **History** grid for the new metabolic center assignment.
      iii. Updates the **Current Assignment**
      iv. Clears the **New Assignment** and **Comments** fields.
   b. **Clear:** Clears the **New Assignment** and **Comments** fields without saving the changes.

Remittance ID Status

Follow Up Center >> Remittance ID Status

The **Remittance ID Status** screen is used to display remittance payment information for approved services performed at a PDC. Once authorized services have been provided by the PDC, the PDC will document and submit service information to GDB in a Patient Services Report (PSR). Once all PSR inconsistencies have been resolved, the service rendered information will be sent from SIS to BSS for payment purposes. After BSS has processed the services, it will send remittance (warrant) information to SIS which can then be viewed by the PDCs and PSQA Monitor.

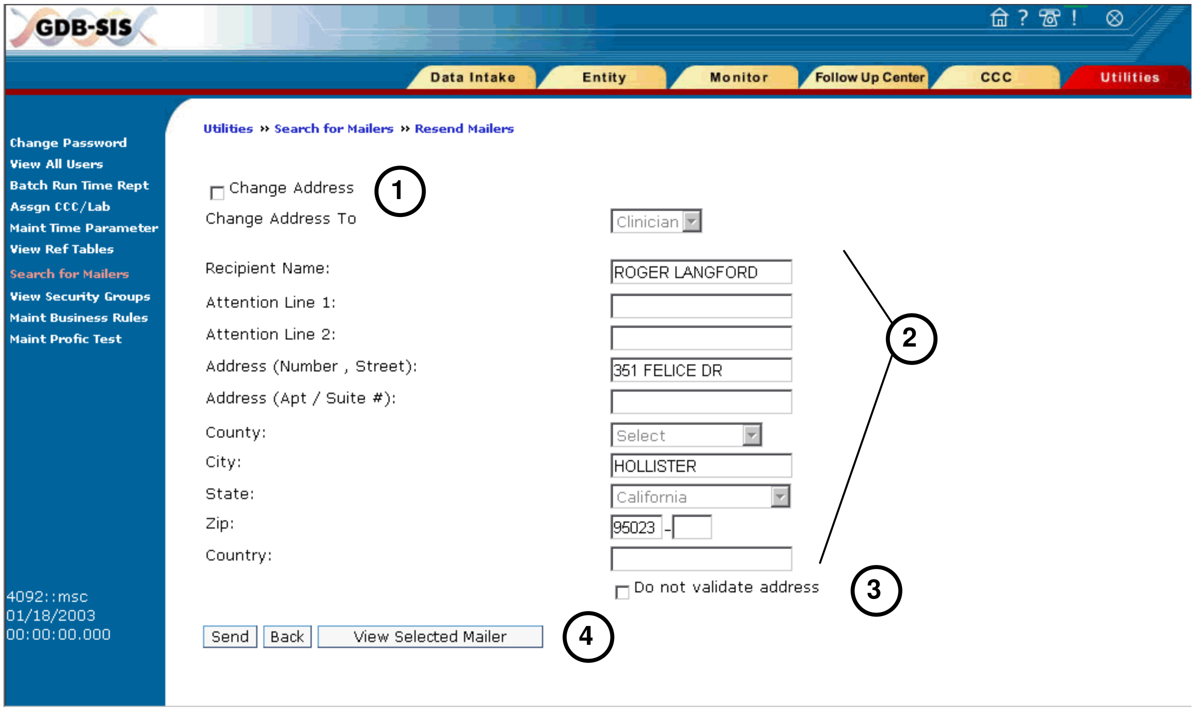


1. Navigation and screen name.
2. Specify the search criteria for the payments you wish to view. You must enter **PDC Code** and select a **Date From** and a **Date To**.
3. **Buttons:**
    a. Click the **Go** button to search for remittance information based on your search criteria.
    b. Click the **Clear** button to clear the search criteria you entered above.
4. Search results grid displays the status of each remittance ID based on the search criteria.
5. Click the **Remittance ID** link to view the Services Rendered screen for the selected invoice.

Resend Mailers

Utilities >> Search for Mailers >> Resend Mailers

This screen enables the user to resend a mailer. The mailer can be mailed to the same address or physician, or to a different address or physician. This screen will also be used to allow access to view the original mailer in PDF format.



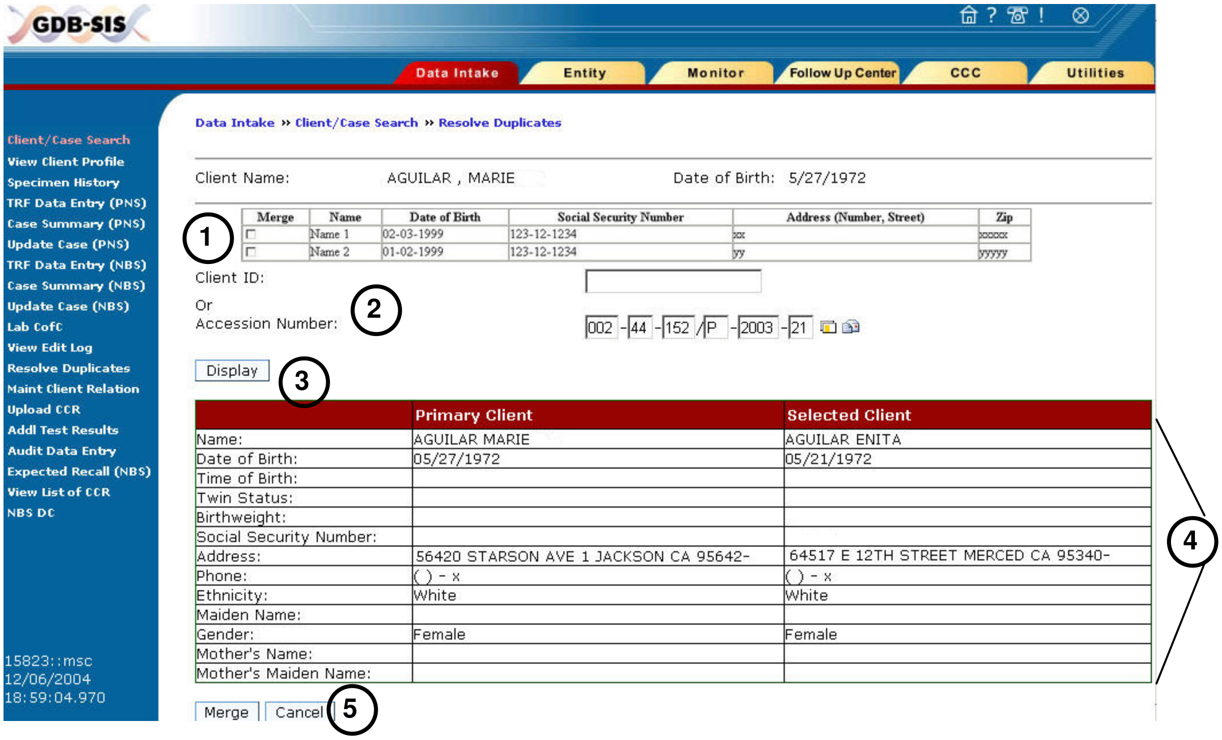
1. Click the **Change Address** checkbox to change the designated address for the mailer. The address information fields will become editable once this box is checked.
2. Address Information: SIS will automatically attempt to validate addresses entered. If possible, SIS will update the address information to a recognized address. For example, if you've entered 1234 Oak Dr., and the address validation program recognizes only a 1234 Oak St., it will automatically update the address information. If you elect to use the address validation feature, you should verify any corrections SIS makes to the address you have entered.
3. **Do not validate address** – Checking the box will deactivate the address validation feature.
4. **Buttons:**
    a. **Send** – Sends the mailer to the address designated in the address fields.
    b. **Back** – return to the previous screen.
    c. **View Selected Mailer** – View an image of the original mailer in PDF format.

Resolve Duplicates

Data Intake >> Client/Case Search >> Resolve Duplicates

This screen allows you to resolve client duplicates by merging an existing client with its duplicate. SIS will automatically identify potential matches for the primary client profile that you are viewing. You can choose a match from the list SIS finds, or specify a client ID or accession number as the selected duplicate client. Exercise care when merging clients, as the action cannot be undone. A warning popup window will display when the Merge button is clicked, requiring you to confirm that you wish to merge the clients.

Resolve Duplicates (continued)



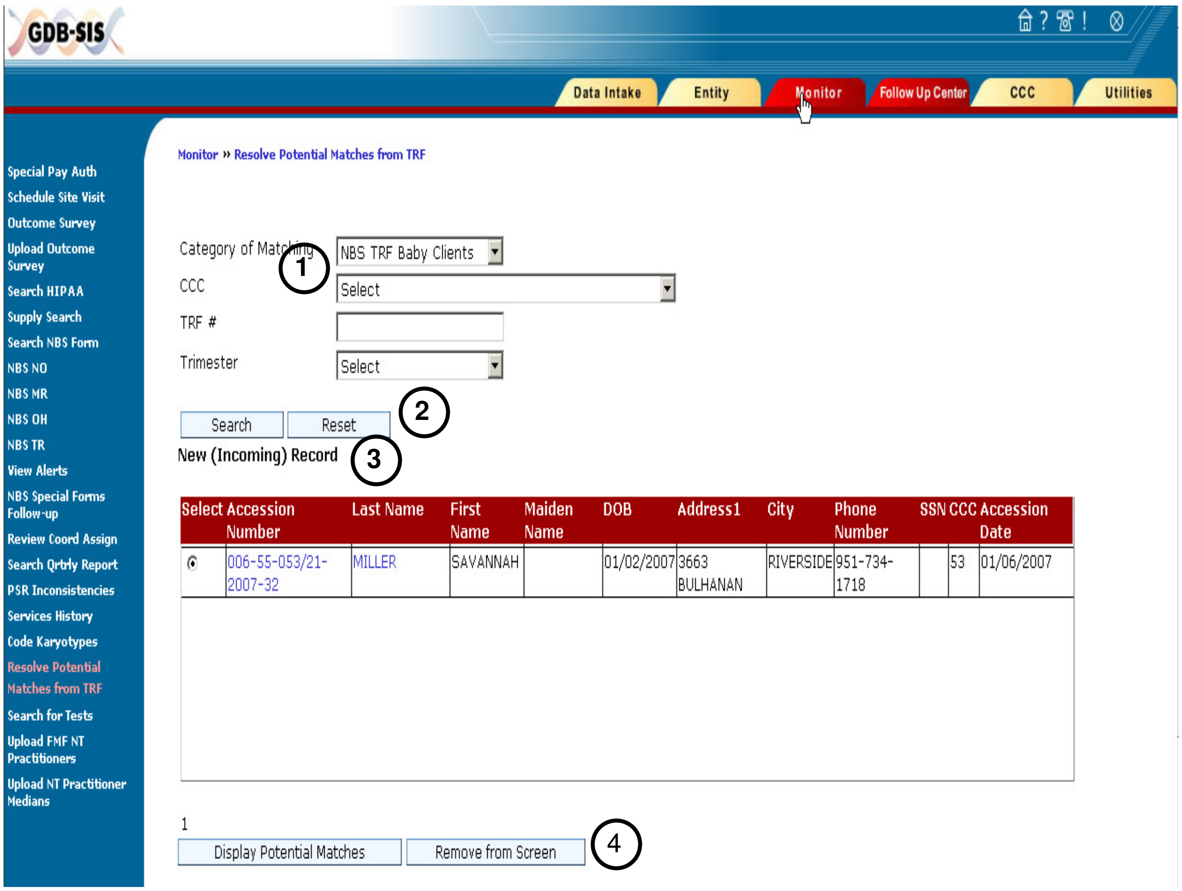
1. Potential Matches for the primary client are displayed in a potential match grid. If the duplicate client is in this list, check the box for that client record and click the **Display** button.
2. If you know the **Client ID** or **Accession Number** of the record you want to merge, you can enter it here.
3. **Display** button will:
    a. Search for the client record you have checked, and load that record in the “Selected Client” column of Merge Data Grid.
    b. Search for either the Client ID or Accession Number you have entered, and load that record in the “Selected Client” column of Merge Data Grid
4. Merge data grid will display the Primary Client and Selected Client details side by side for comparison. The selected client is obtained based on the client record you selected for display (see #3).
5. **Buttons:**
    a. **Merge** button will merge the two clients. The selected client’s record and personal information will be deleted. However, the other information, such as Address, Contact, Telecom, and Alias will be added to the primary client’s record. Exercise care when merging clients, as the action cannot be undone.
    b. **Cancel** button will cancel the operation and reload a blank screen.

Resolve Potential Matches from TRF

Monitor >> Resolve Potential Matches from TRF

The Potential Matches screen displays the details about the New (Incoming) and Potential Matches records found by automated system and in this page have the option to search potential matches based on Category, CCC, TRF# and Trimester. This screen has the options to Merging the client and Link Babies.

FIGURE 1



1. Search can be done using the following fields and all are in and condition.
   a. **Category of Matching** - This select field and it has 5 values.
      i. PNS TRF Cases
      ii. PNS TRF Clients
      iii. NBS TRF Baby Clients
      iv. NBS TRF Mother Clients
      v. Other

Resolve Potential Matches from TRF - (continued)

b. **CCC** - This is select field.

c. **TRF#** - This is entry field.

d. **Trimester** - This is select field and values are Trimester description.

i. 1st Trimester

ii. 2nd Trimester

2. Search & Reset buttons

a. **Search** button - Allows searching the incoming TRF details for the selected/entered search condition. At least one search condition is required.

b. **Reset** button - Reset the page.

3. New (Incoming) Grid – Displays the new incoming records for the search condition and the following fields will be displayed in the grid.

a. **Accession Number**

b. **Last Name**

c. **First Name**

d. **Maiden Name**

e. **DOB**

f. **Address1**

g. **City**

h. **Phone Number**

i. **SSN**

j. **CCC**

k. **Accession Date**

4. Display Potential Matches and Remove from screen buttons

a. **Display Potential Matches** button - Displays the potential matches for the selected row from New (Incoming) Record grid.

b. **Remove from screen** button - The selected client will be removed from "New Incoming Record" grid and corresponding records also be removed.

Resolve Potential Matches from TRF - (continued)

FIGURE 2

Potential Matches

5

Select	Client Score	Last Name	First Name	Maiden Name	DOB	Address1	City	Phone Number	SSN	Acc Date	Type of Most Recent Acc#	Case Match?
(•)	65.0	MARTINEZ	MICAELA	HERNANDEZ	01/05/1980	4727 SHADOW STONE ST	BAKERSFIELD	661-664-7521	610011179		119-53-058/21-1999-71	N
( )	65.0	MARTINEZ	MICAELA	HERNANDEZ	01/05/1980	4727 SHADOW STONE ST	BAKERSFIELD	661-664-7521	610011179		119-90-044/31-1999-22	N
( )	65.0	MARTINEZ	MICAELA	HERNANDEZ	01/05/1980	4727 SHADOW STONE ST	BAKERSFIELD	661-664-7521	610011179		121-46-052/21-1999-12	N

Display Details

6

Label	New (Incoming) Record	Existing Client Case Record
Client ID	34537582	25810269
Last Name	MILLER	MARTINEZ
First Name	SAVANNAH	MICAELA
Maiden Name		HERNANDEZ
Other Name	MILLERSAVANNAH	MARTINEZ MICAELA
DOB	1/2/2007	1/5/1980
Time of Birth	1258	
Address1	3663 BULHANAN	4727 SHADOW STONE ST
Address2	31	
City	RIVERSIDE	BAKERSFIELD
Zip Code	92503	93313
Phone Number	951-734-1718	661-664-7521
Previous Address1		3901 Q St
SSN		610011179
Medical Record Number	F00247894	797377
Ethnicity/Race	White	White, Hispanic, Unknown
Birth Weight	3332	
Twin Status		U
Sex	Female	Female
Clinician Name	JABAJI LEILA	FRELINGER RICHARD
Clinician Phone Number	909-861-1888	661-326-2000
GA Today	0	0
Number of Fetuses		Unknown
Patient's Weight		159.0
1st Trimster TRF#		
Current TRF#	2204606576	0486413085L
Interp of Most Recent Accession Number		Complete, Screen Negative

msc::001
08/27/2008
09:48:51.060

Merge Client | Link Babies | Clear

7

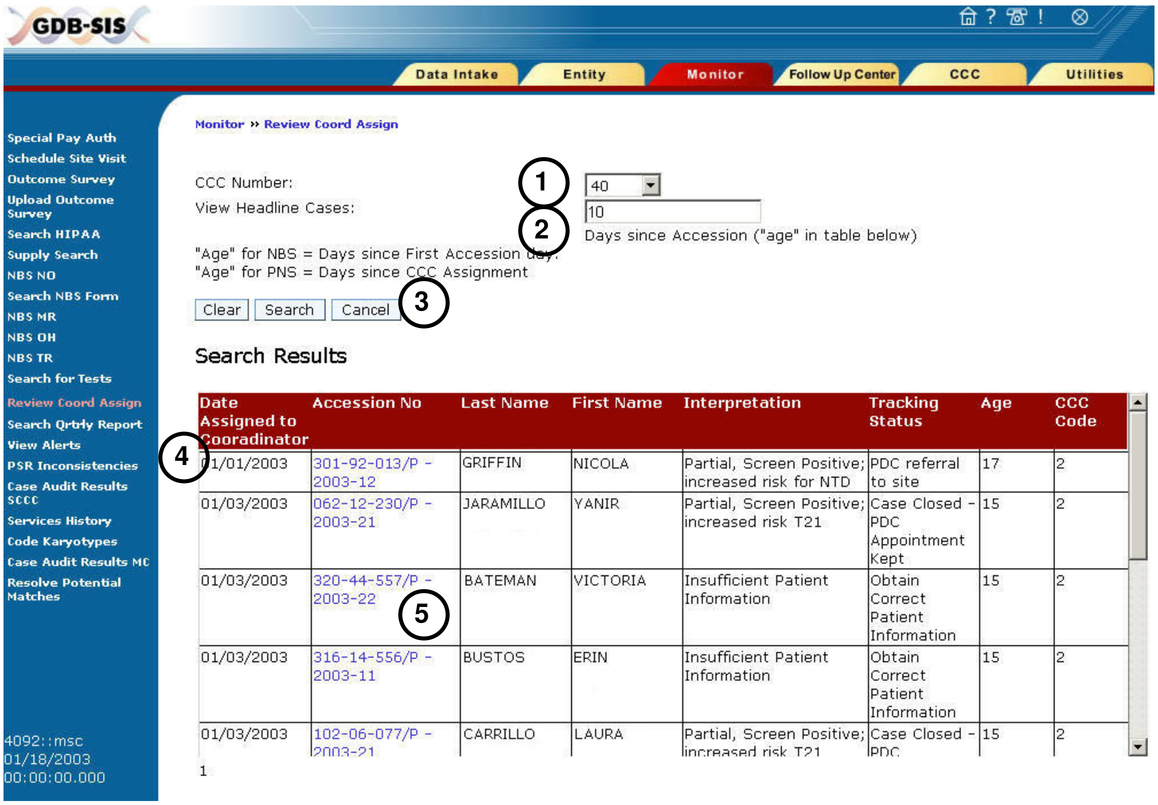
Resolve Potential Matches from TRF - (continued)

5. **Potential Matches Grid** - Displays the top 5 Potential Matches records for the selected incoming record. Top 5 will be filtered based on the client score (match score). The following fields will be displayed in the grid.
    a. **Client Score** - This is matched percentage by Netrics Client Matching system.
    b. **Last Name**
    c. **First Name**
    d. **Maiden Name**
    e. **DOB**
    f. **Address1**
    g. **Phone Number**
    h. **SSN**
    i. **Accession Date**
    j. **Most Recent Accession #**
    k. **Case Match?** - If any case match found then it will display “Y” otherwise “N”.
6. **Display Details** button - Display the details for the selected record from New (Incoming) Record and Potential Matches. The following details will be displayed in the grid.
    a. **Label** - description of the display details.
    b. **New (Incoming) Record** - Display the details for the selected New incoming record.
    c. **Existing Client Case Record** - Display the details for the selected Potential match record.
7. **Buttons**
    a. **Merge Client** button –
        i. If the clients are merged successfully then displays the success message on the page header and merged clients will be removed from this screen. If any error then error message will be displayed on the page header and clients will not be removed from this screen.
        ii. This button will be enabled for PNS, NBS Mother and NBS Baby (if the selected client in Potential matches grid “Most Recent Accession #” has blank value.)
    b. **Link Babies** button –
        i. “**Link NBS**” screen will be displayed with pre populated baby details.
        ii. This button will be enabled for selected NBS Baby “Most Recent Accession #” has value otherwise it will be disabled
    c. **Clear** button - This will be clears the display details grid and the selection of the Potential Matches grid.

Review Coordinator Assignment

Monitor >> Review Coord Assign

This screen allows you to view the status and "age" of cases that have been assigned to each CCC. "Age" for NBS cases is based on the first accession day. "Age" for PNS cases is based on CCC assignment.



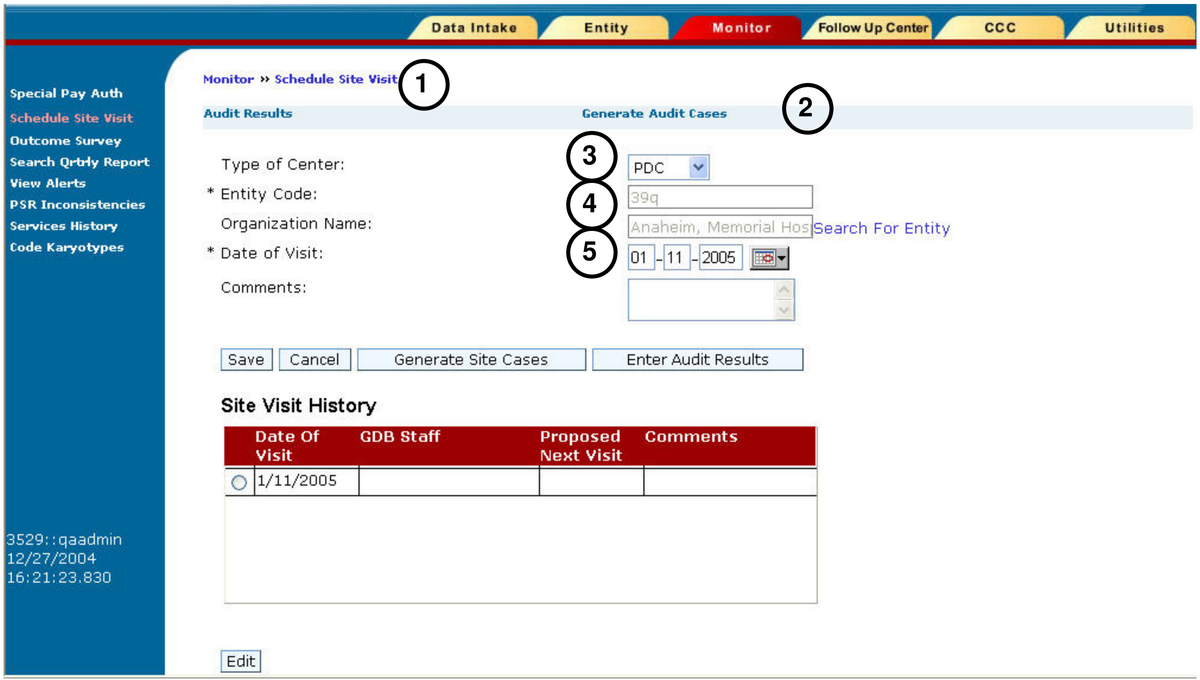
1. Select the **CCC Number** that you wish to review.
2. Enter the "Days since Accession" in the **View Headline Cases** field. For example, if you enter "10", the Search Results will return all cases that appear on a coordination center's headline case screen that are at least 10 days old or more.
3. **Buttons:**
   a. **Clear** button clears the information from all fields, and reloads a blank screen.
   b. **Search** button initiates a search based on the criteria you have entered.
   c. **Cancel** button cancels the current operation and directs you to the previous screen.
4. **Search Results** grid displays all cases on a coordination center's headline case screen that match the search criteria. Clicking on a column header will sort the data by that column.
5. The **Accession Number** link directs you to the Case Summary screen for the selected case.

Schedule Site Visit

Monitor >> Schedule Site Visit

The **Schedule Site Visit** screen is used to schedule a visit to a State-approved Prenatal Diagnosis Center (PDC) Metabolic Center (MC) or Sickle Cell Counseling Center (SCCC) facility for the purpose of auditing the facility.

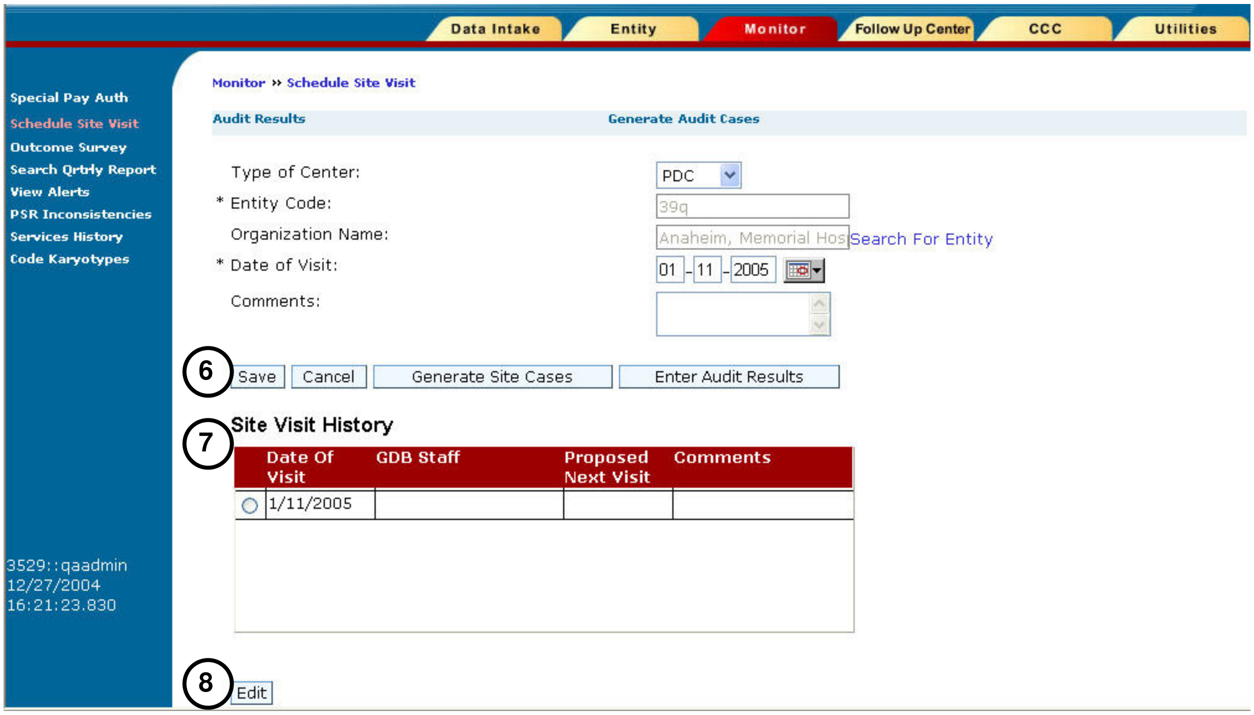
FIGURE 1



1. Navigation and screen name.
2. 3rd level links.
3. **Type of Center** is a required field. You must select the type (PDC, SCCC, MC) to proceed with scheduling a site visit.
4. **Entity Code** is a required field. Since this is a read-only field, you must use the **Search for Entity** link to find the Entity Code and Organization Name for the site that will be visited.
5. **Date of Visit** for the site visit is a required field for scheduling future site visits.

Schedule Site Visit (continued)

FIGURE 2



6. **Buttons:**

   a. **Save** - saves a site visit record for the facility and date you have identified. For PDC site visits, after you click the Save button an alert will notify the PDC of the site visit. If the site visit is scheduled more than 30 days in advance, the alert will be triggered at exactly 30 days before the site visit. If the site visit is schedule fewer than 30 days in advance, the alert will be sent immediately.

   b. **Cancel** clears all information in the fields above it discarding any unsaved information.

   c. **Generate Site Cases** button creates a list of cases from the facility that you wish to audit during the site visit after clicking the radio button next to one of the records in the Site Visit History grid.

   d. After the site visit, click the radio button next to the scheduled site visit. Next click the **Enter Audit Results** button to enter the results of the site visit in SIS.

7. The **Site Visit History** grid displays a list of all site visits that have been scheduled in SIS for the selected facility.

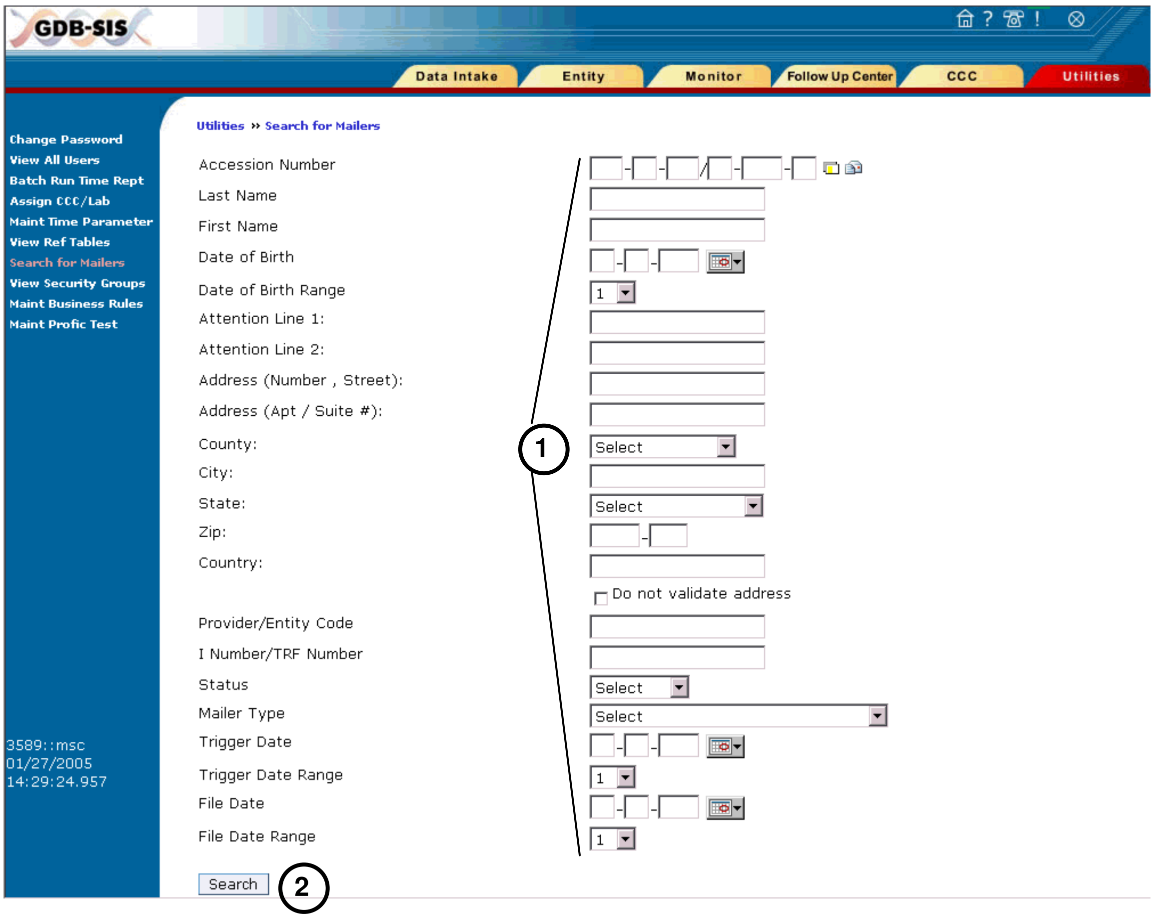
8. **Edit Button:** Click the radio button next to one of the records in the Site Visit History grid, then click the **Edit** button to change schedule information for a site visit record.

Search For Mailers

Utilities >> Search For Mailers

This screen allows you to search for mailers that have been scheduled, sent, or cancelled based on several specimen specific, patient specific and mailer specific search criteria. Pending mailers can be cancelled from this screen. To resend mailers, there are links provided to navigate the "Resend Mailers" screen.

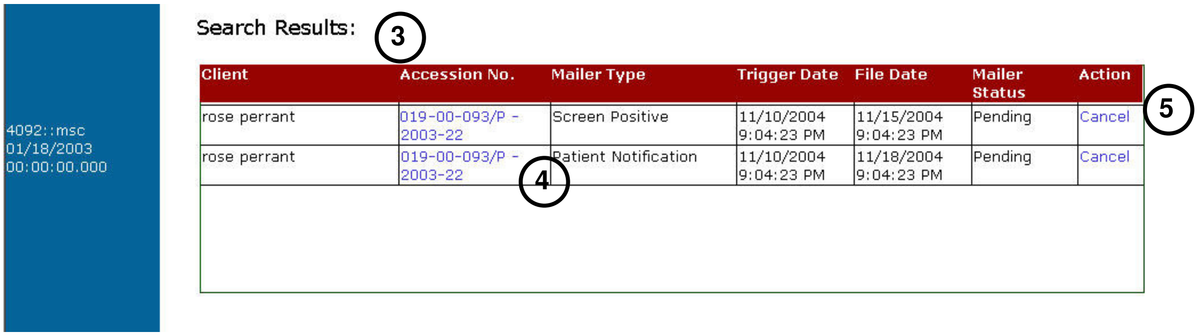
FIGURE 1



1. Enter search criteria into these fields. Mailers cannot be searched just based on first and last name only; additional criteria must be specified to improve the effectiveness of the search. If the search returns more than 50 results, a warning will display to refine the search criteria.
2. **Search** button will initiate a search based on the search criteria entered.

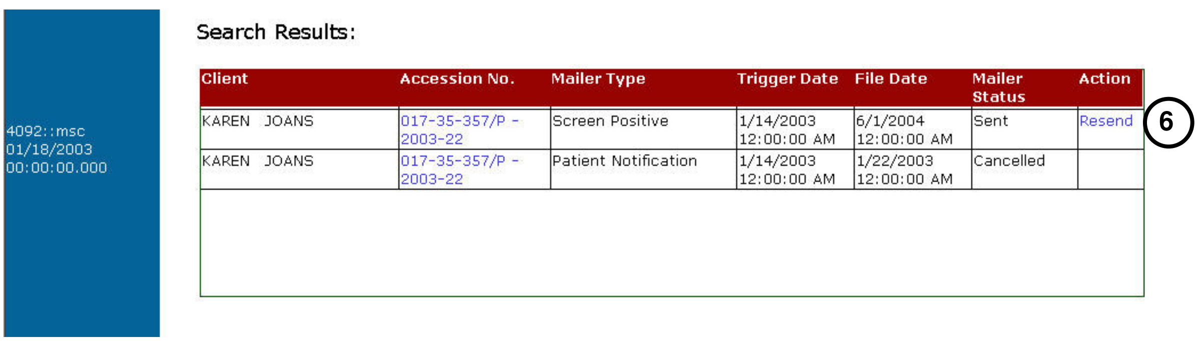
Search For Mailers (continued)

FIGURE 2



3. **Search Results** grid will display all records that match your search criteria. Search results will also display all the mailers of all accession numbers which are related to the same case.
4. **Accession No.** link will direct to the Case Summary screen.
5. For pending mailers, the **Cancel** link will cancel the mailer. The screen will be reloaded and the mailer status will be updated to show “cancelled”.

FIGURE 3



6. For sent mailers, the **Resend** link will direct you to the Resend Mailers screen, allowing you to view the previous mailer, and resend if necessary.

Search for NT Data

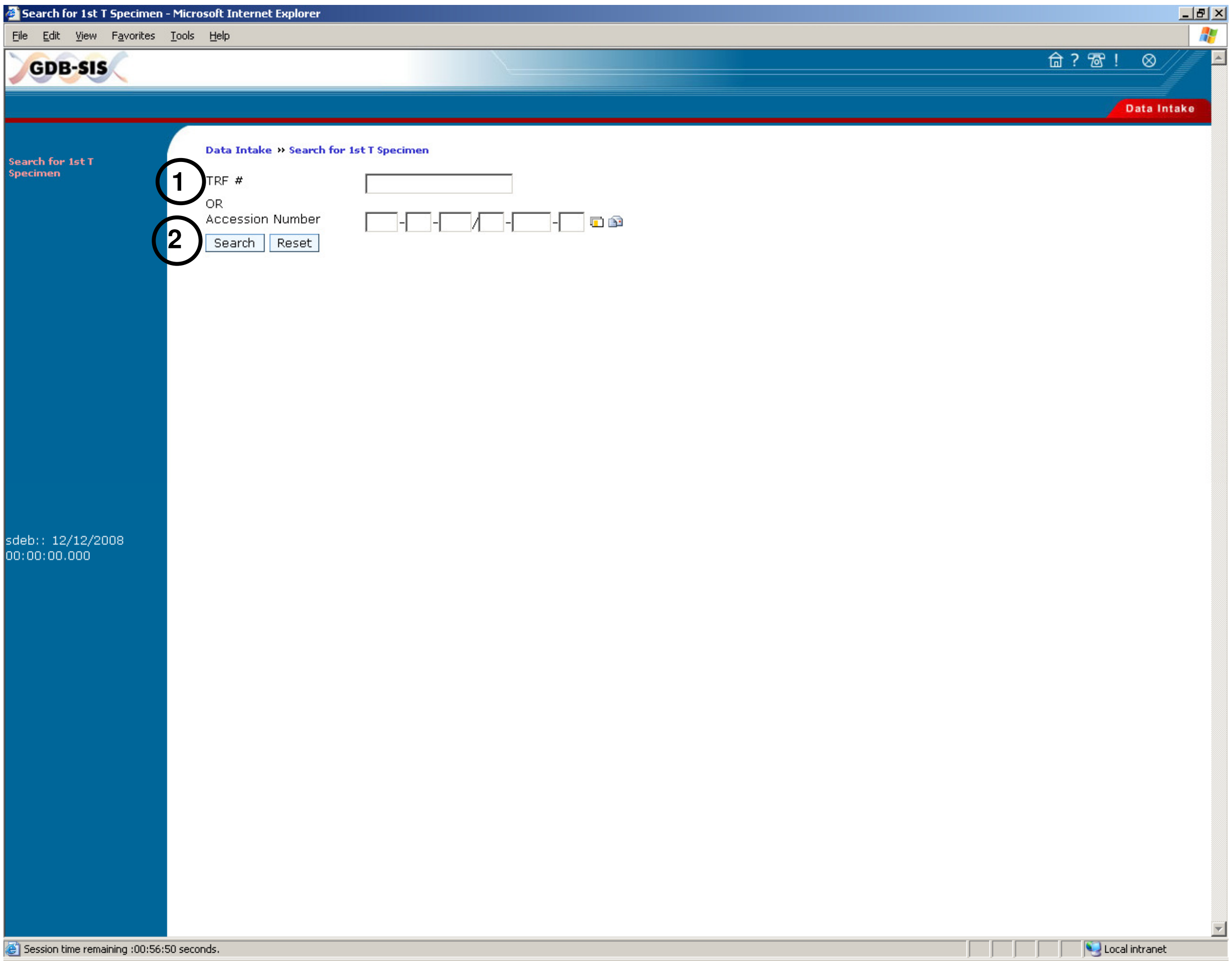
Data Intake » Search for 1st T Specimen

The Search for NT Data screen is used to search for 1st T specimens

To navigate to Search for NT Data screen, you should log in as NT Practitioner and select the entity.

Search for NT Data screen

FIGURE 1



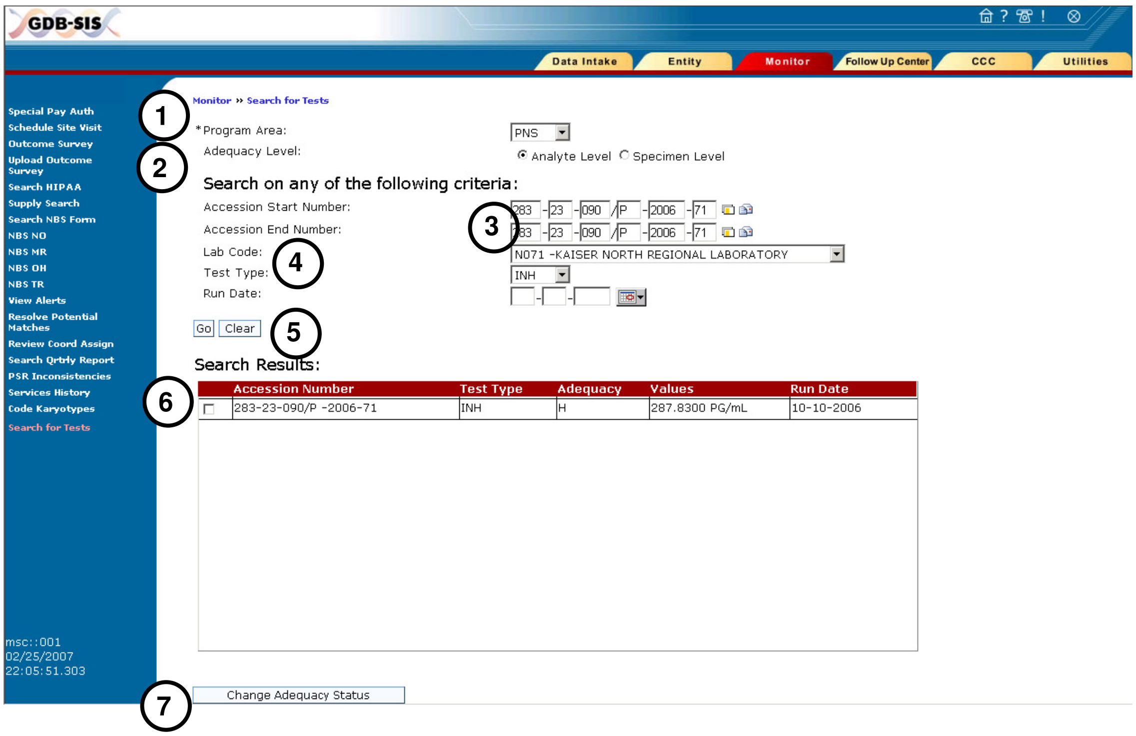
4. The Search can be made using TRF # or Accession Number.
5. **Buttons**:
    a. The Search button searches for 1st T specimen using the TRF # or Accession Number. If data is already entered for the accession number by another NT Practitioner, then search is not allowed to proceed further.
    b. Reset button resets the search.

Search for Tests

Monitor >> Search for Tests

This screen allows a user to search for a test or a group of tests on the basis of the program area (NBS or PNS) and other criteria like accession number.

FIGURE 1

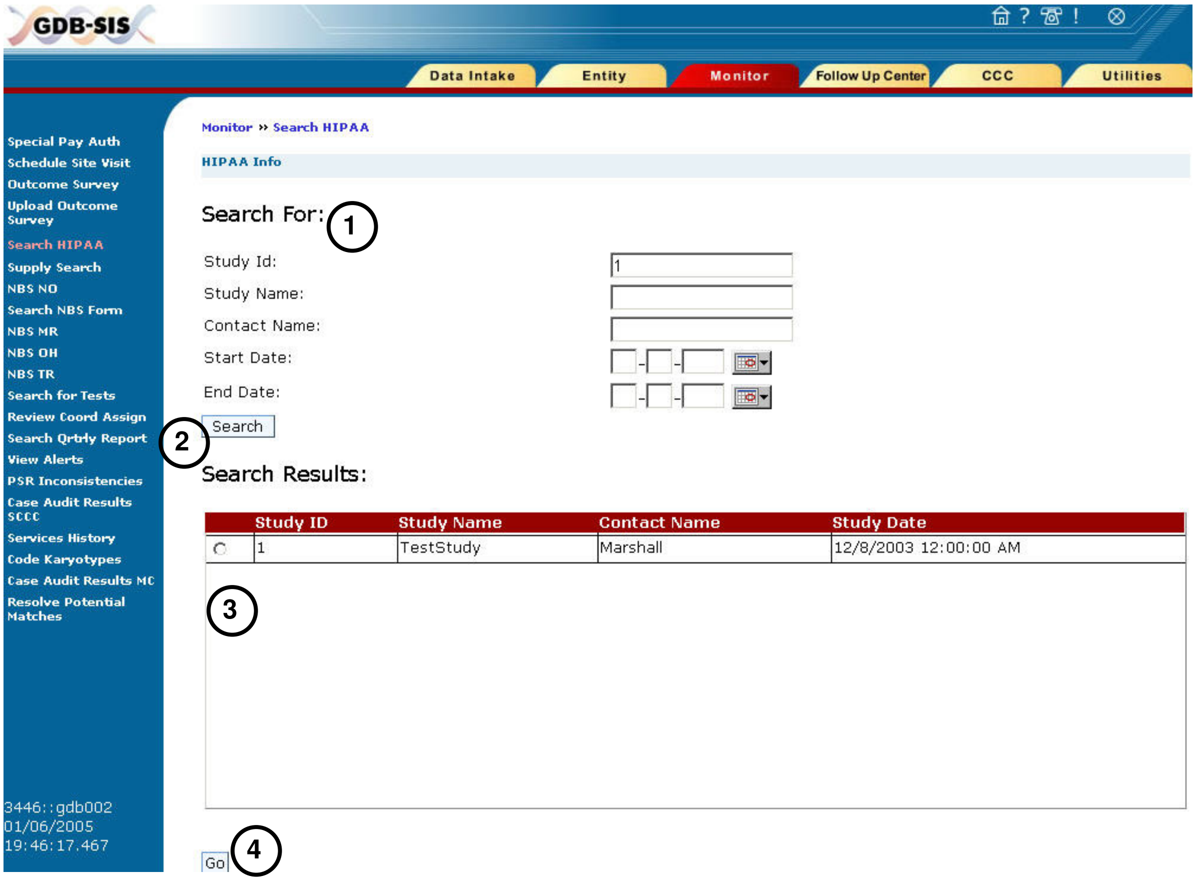


1. **Program Area** is a required field which includes two options, NBS and PNS. If the user selects PNS, the screen will appear as above. If the user selects NBS, the **Search Results** grid will not appear.
2. **Adequacy Level:** User can choose which type. Note: If analyte values are not present, search will return one row for each test.
3. **Accession Start Number:** If accession number is entered, then both start and end numbers are required.
4. **Lab Code, Test Type** and **Run Date** may be entered as search criteria. At least two of the three must be entered.
5. Click **Go** button to enter data or **Clear** to clear the data fields.
6. **Search Results:** This grid displays all analytes for the case and one or more tests can be selected to change the adequacy status.
7. Select the appropriate case and click the **Change Adequacy Status** button which takes the user to a different screen where the **Adequacy Status** can be changed.

Search HIPAA

Monitor >> Search HIPAA

This screen allows you to search for existing HIPAA sample studies.

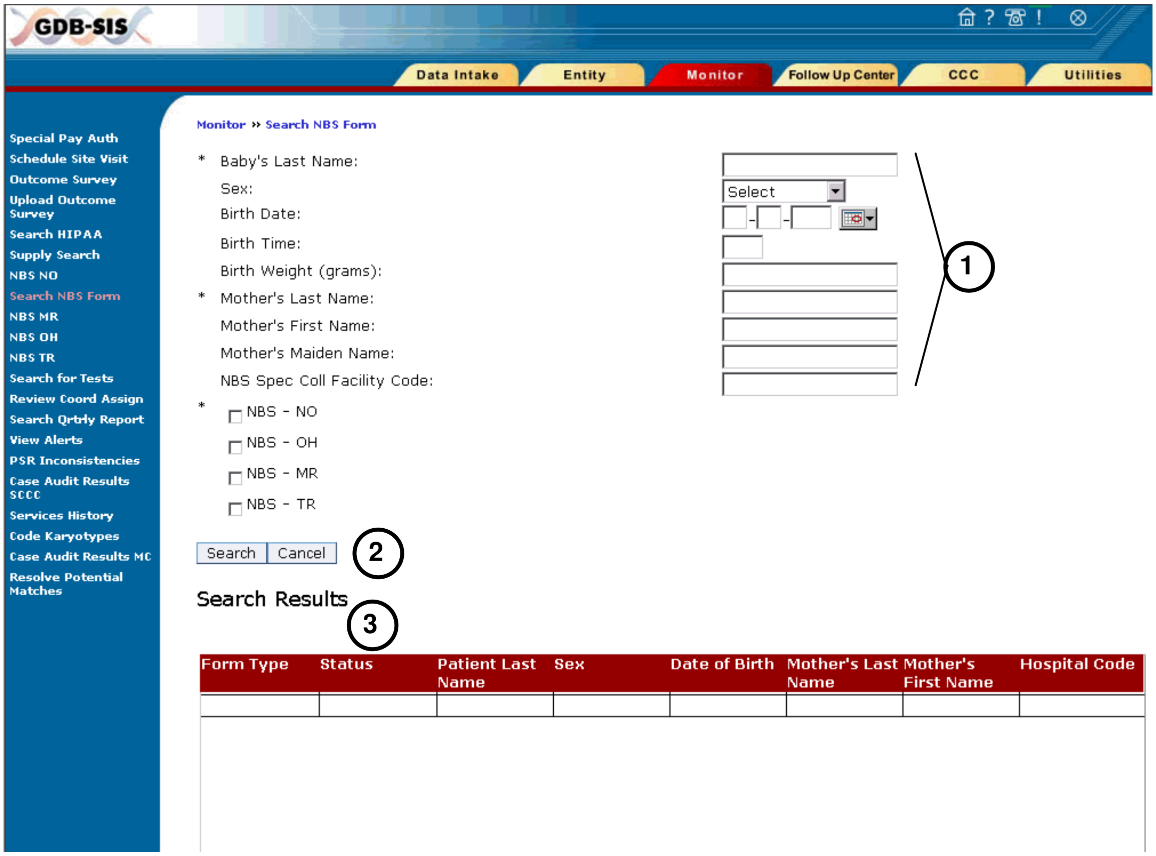


1. Enter **Search For** criteria in these fields. SIS will search for any combination of criteria that you enter.
2. **Search** button initiates a search based on the entered criteria.
3. **Search Results** grid displays all sample studies matching your search criteria. Select the sample study you wish to view and/or edit by using the radio buttons.
4. **Go** button will direct you to the HIPAA Information screen, which allows you to view and edit the sample study you selected using the radio buttons. If no search criteria are entered, the Go button will direct you to the HIPAA creen, allowing you to create and enter a new study.

Search NBS Form

Monitor >> Search NBS Form

This screen allows you to search for NBS forms that have been entered into SIS.

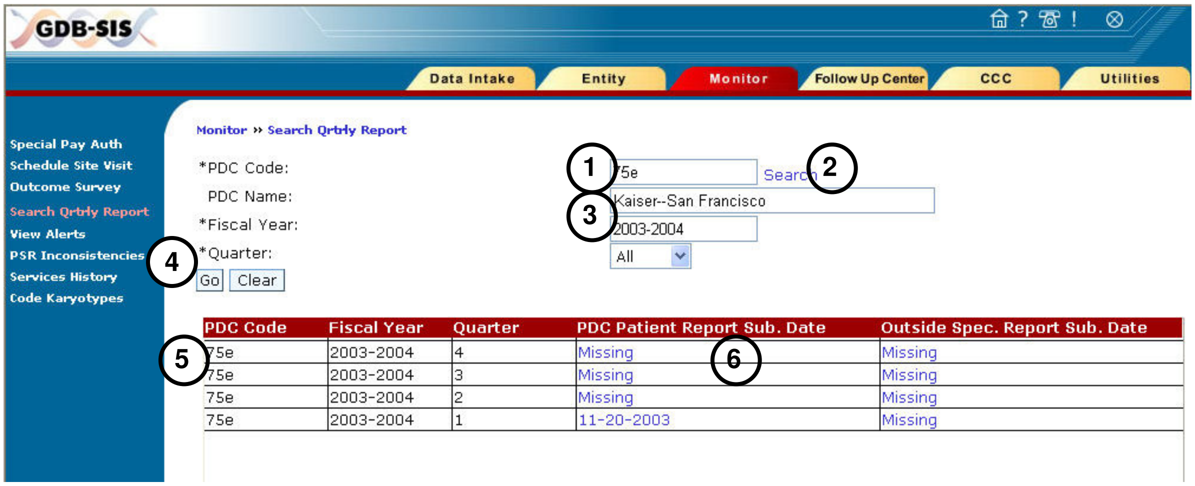


1. Enter values in the search criteria fields. **Baby's Last Name**, **Mother's Last Name**, and the Test Results Form type (**NBS - NO**, **NBS - OH**, **NBS - MR**, or **NBS - TR**) are all required fields.
2. **Buttons**:
    a. **Search** – Search for records matching the entered search criteria
    b. **Cancel** – cancel the search.
3. Records matching the search criteria are displayed in the **Search Results** table.

Search Quarterly Report

Monitor >> Search Qrtrly Report

The **Search Qrtrly Report** screen is used to find and view both Patient and Outside Specimen Quarterly Reports for a given PDC.



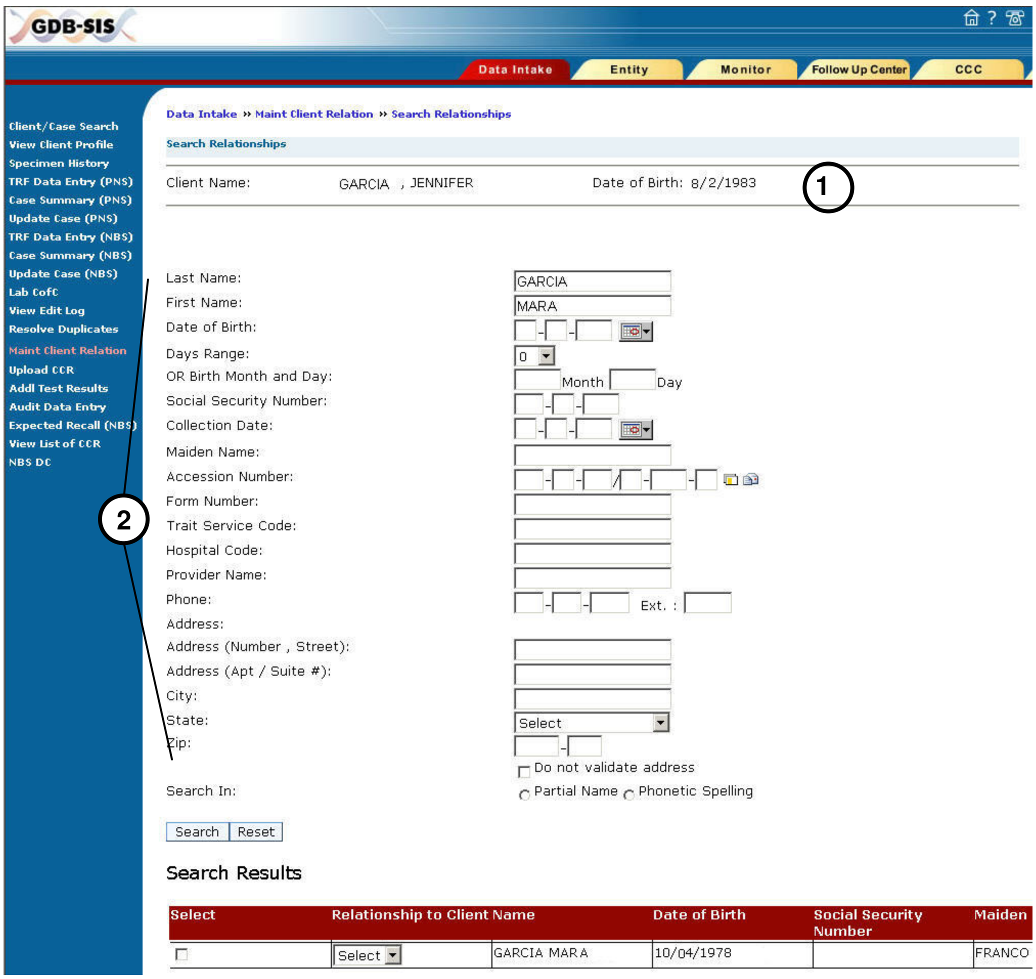
1. PDC Code is a required field. Enter the **PDC Code** (if known) or;
2. Click the **Search** link to search for a PDC Code and PDC Name.
3. **Fiscal Year** and **Quarter** are required fields. Specify a date range (e.g. 2003-2004) for the Fiscal Year and select a quarter number (1-4 or "All") for the Quarter.
4. **Buttons:**
    a. Click the **Go** button to search for Quarterly Report information with the criteria specified above.
    b. Click the **Clear** button to clear the search criteria.
5. The results of your search are displayed in the grid at the bottom of the screen.
6. Click the date link in either the **PDC Patient Report Sub. Date** column or in the **Outside Spec. Report Sub. Date** column to view the report submitted by the PDC on that date. Click the **Missing** hyperlink to navigate to the Quart Rept-Patients or Quart Rept-Specimens screen for the selected PDC, Fiscal Year and Quarter where you can enter Quarterly Report Data.

Search Relationships

Data Intake >> Maint Client Relation >> Search Relationships

Once you have specified a client on the Maintain Client Relationships screen, the **Search Relationships** screen allows you to search for another client with whom to create a relationship, such as child, parent or sibling. This screen will be displayed after clicking the Add button on the Maintain Client Relationships screen. You may search using the Accession Number or Form Number alone, or by entering at least two other criteria together.

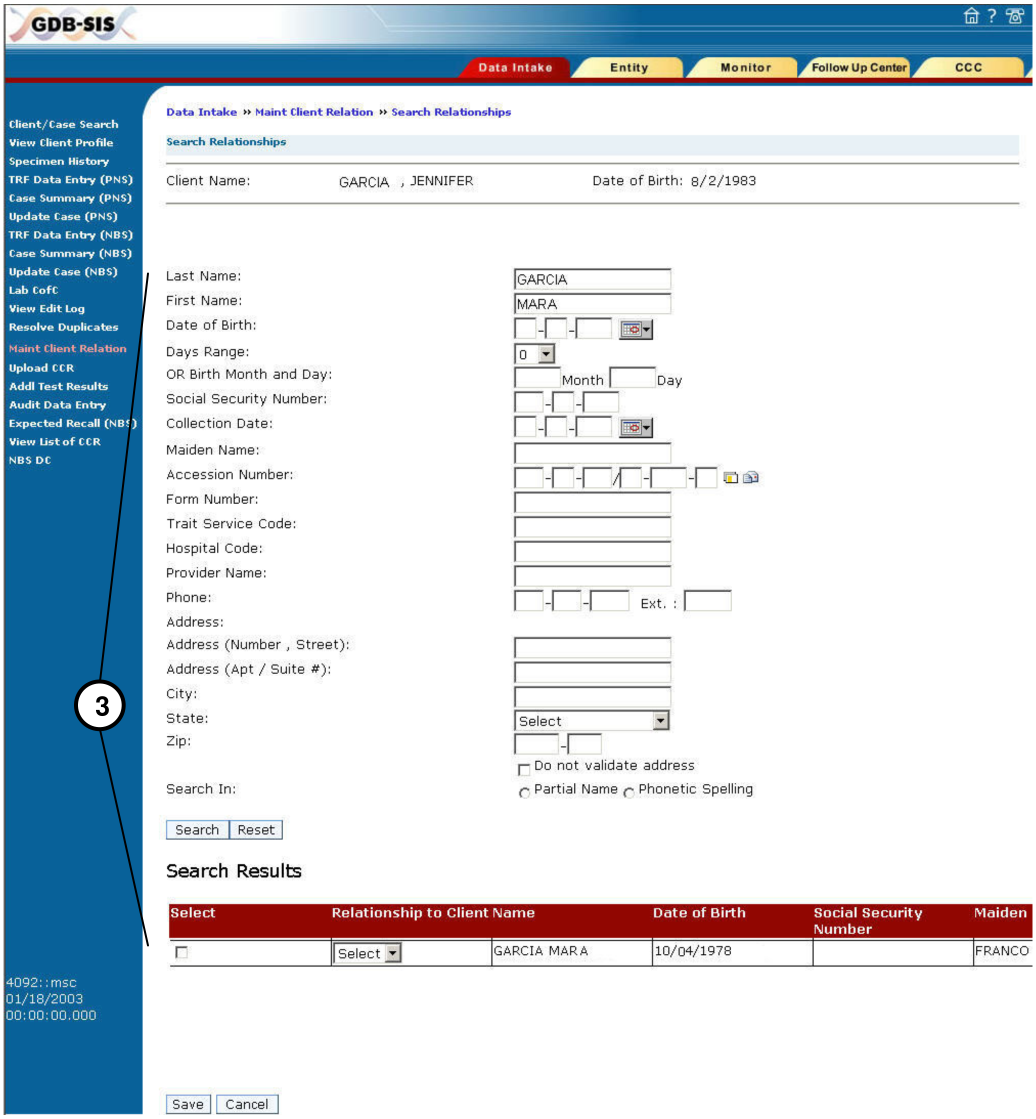
FIGURE 1



1. The original client is displayed in a read-only format, based on the client selected in the Maintain Client Relation screen.
2. Accession Number or Form Number can be used individually as search criteria. If neither the Accession Number nor Form Number is available, at least two of the remaining fields must be used together in order to search.

Search Relationships (continued)

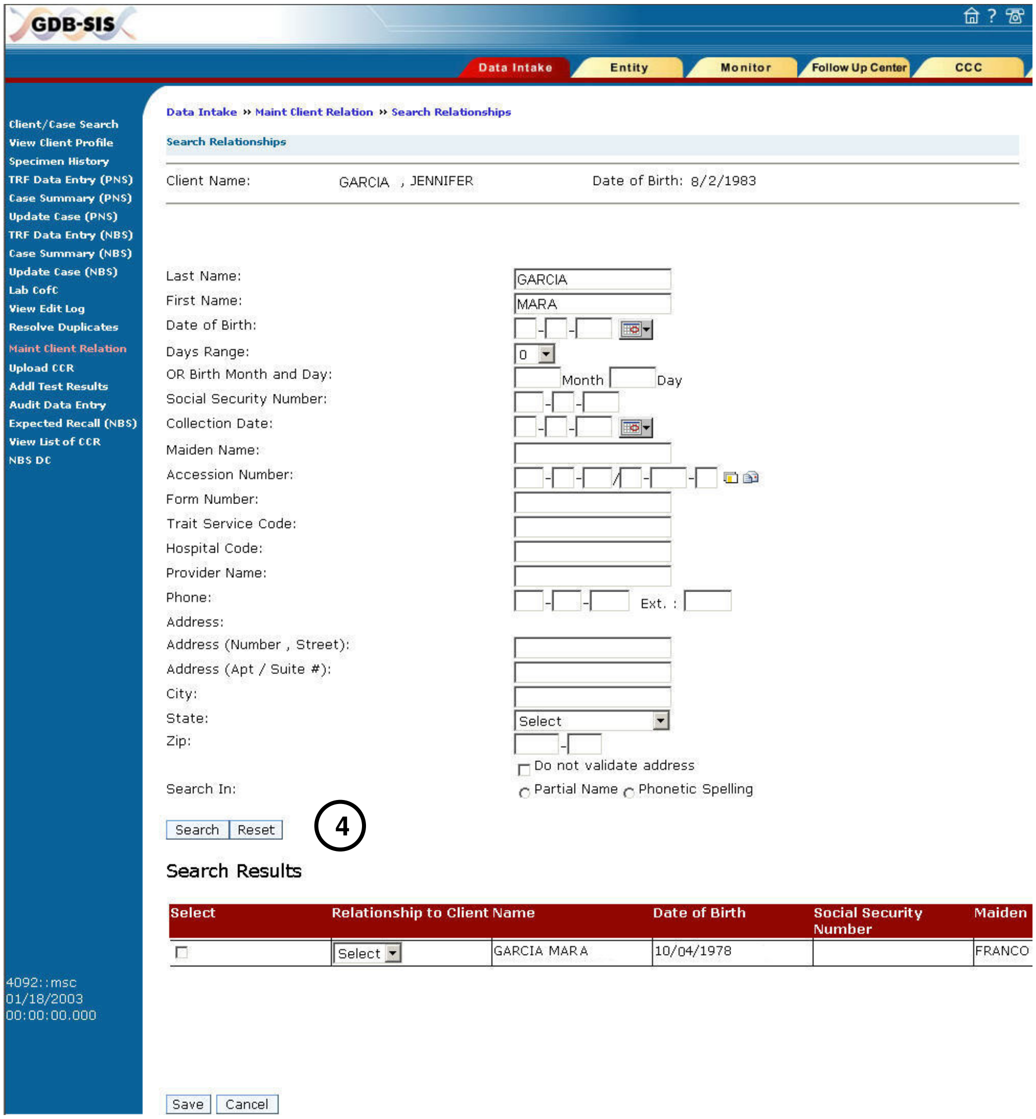
FIGURE 2



3. Search Options allows you to specify the type of search you wish to perform.
   a. **Do not validate address** disables the SIS automatic address correction process. If you allow SIS to validate addresses you should ensure that the address provide by SIS is desired.
   b. **Partial Name** allows you to enter part of a name, and return all matching records.
   c. **Phonetic Spelling** allows you to enter the phonetic spelling of a name, and return all matching records.

Search Relationships (continued)

FIGURE 3



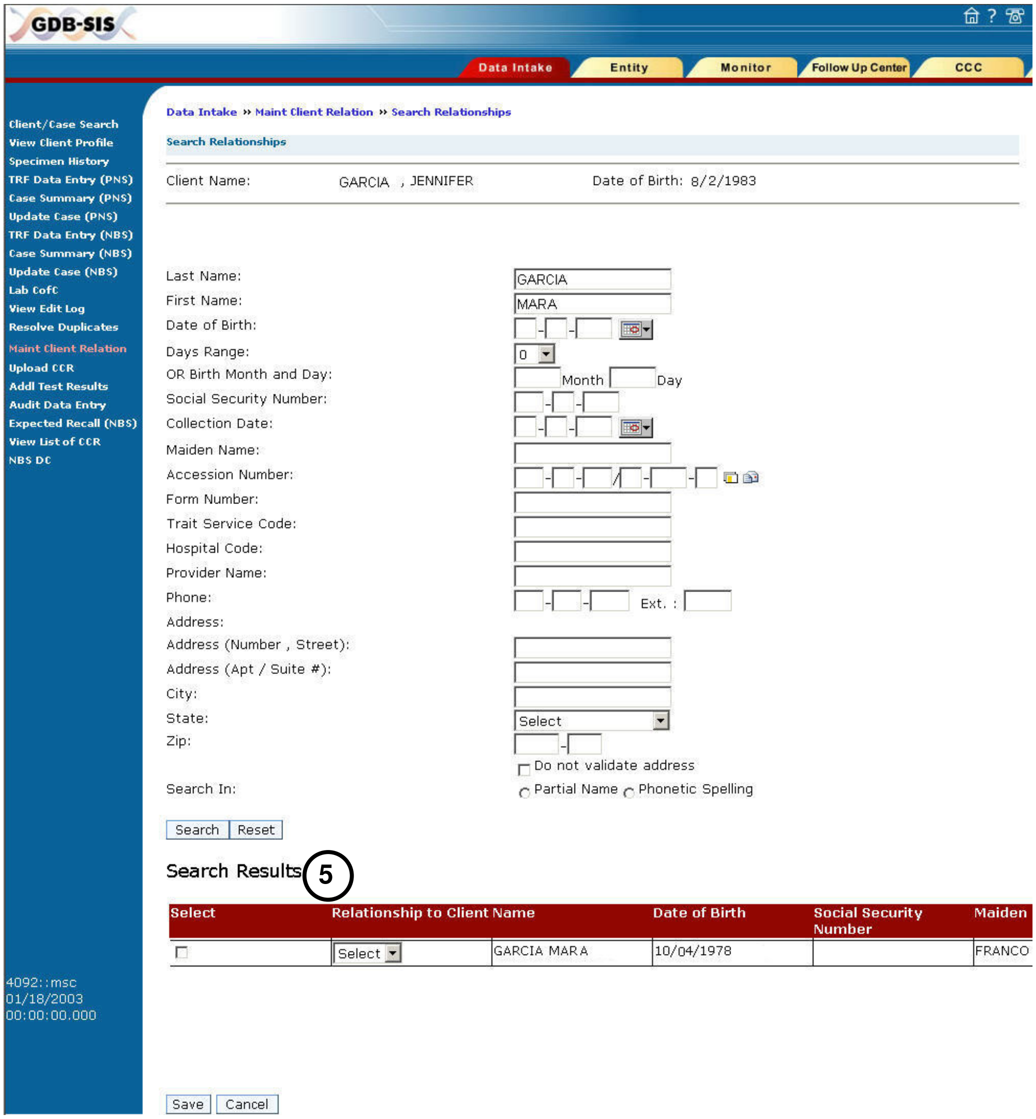
4. **Buttons**:

    a. **Search** – Initiates a search based on the search criteria you have entered.

    b. **Reset** – When used before you click the Search button, will clear all information from all fields. When used after you have clicked the Search button, the Reset button will clear all search criteria fields, as well as any search results in the Search Results grid.

Search Relationships (continued)

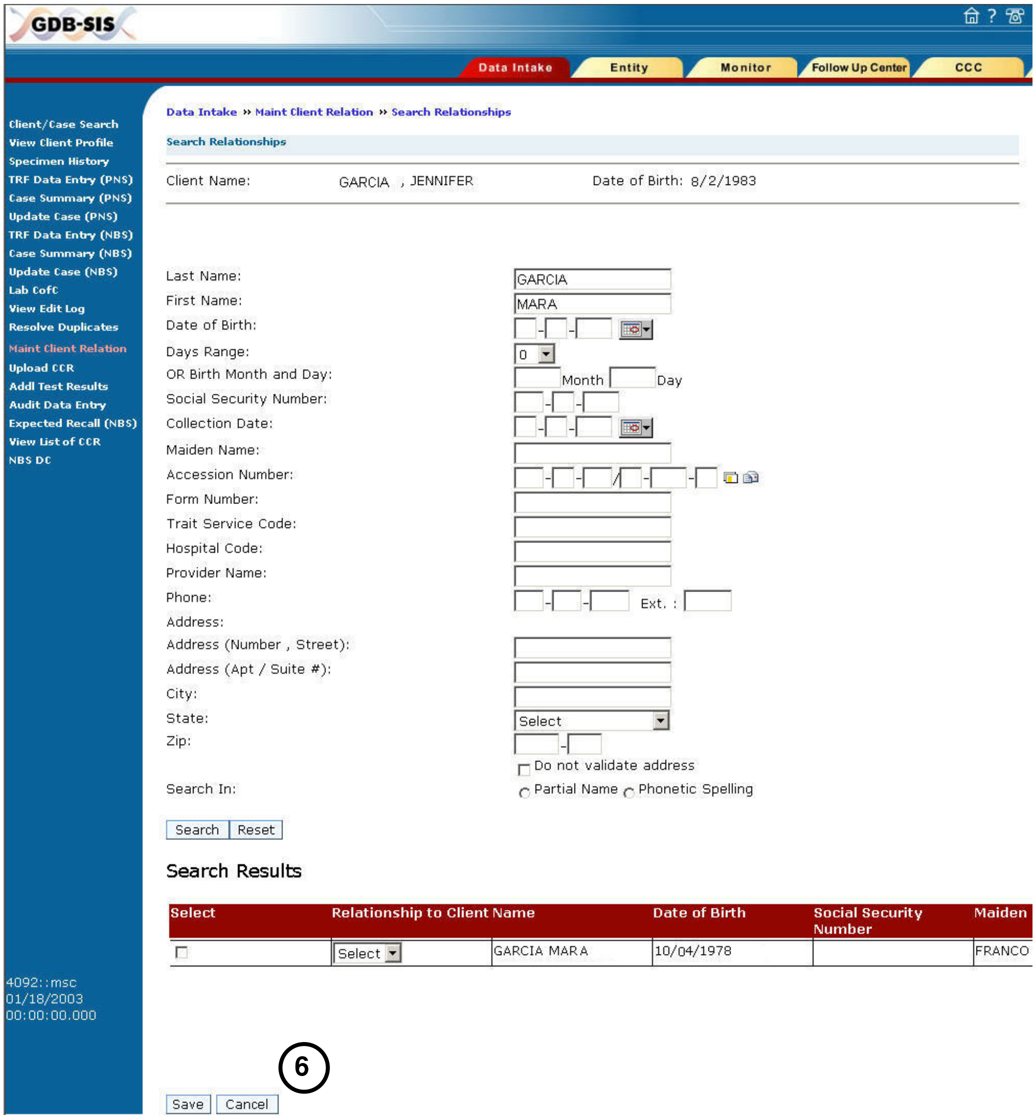
FIGURE 4



5. **Search Results** grid will display all records that match your search criteria. You may establish a relationship between the original client (see #1) and a client in the Search Results grid by checking the box in the Select column, selecting a relationship from the Relationship to Client dropdown (this should be the relationship of the person in the grid row to the person in the header), and then clicking the **Save** button.

Search Relationships (continued)

FIGURE 5



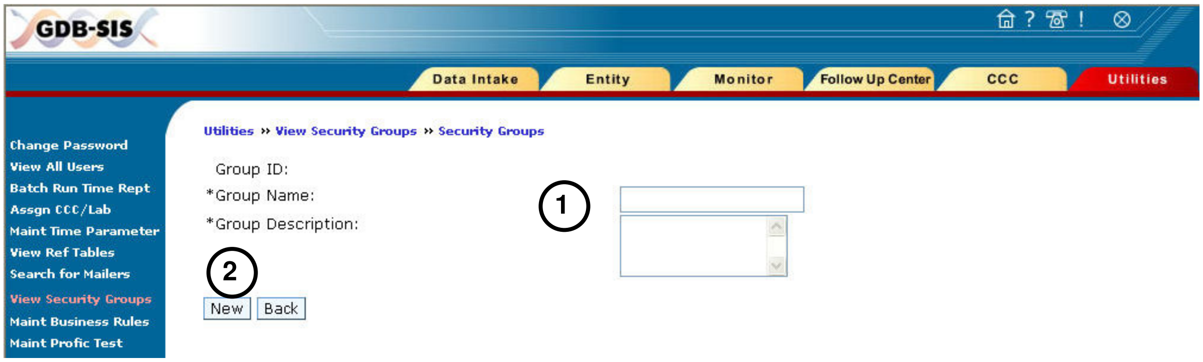
6. **Buttons**:
    a. **Save** – Saves the relationship data you have specified in the Search Results grid. A record will be added to Current Relationships grid in the Maintain Client Relation screen.
    b. **Cancel** – Cancels the current activity and the user is returned to the Maintain Client Relation screen.

Security Groups

Utilities >> View Security Groups >> Security Groups

The **Security Groups** screen is used to create and edit security group profiles.

FIGURE 1



1. To add a new security group, enter the **Group Name** (required) and **Group Description** (required). The **Group ID** will be created automatically, and is a read-only field.
2. **Buttons:**
   a. Click the **New** button to create a new security group, once you've entered the Group Name and Description.
   b. Click the **Back** button to return to the View Security Groups screen, discarding any unsaved information you have entered.

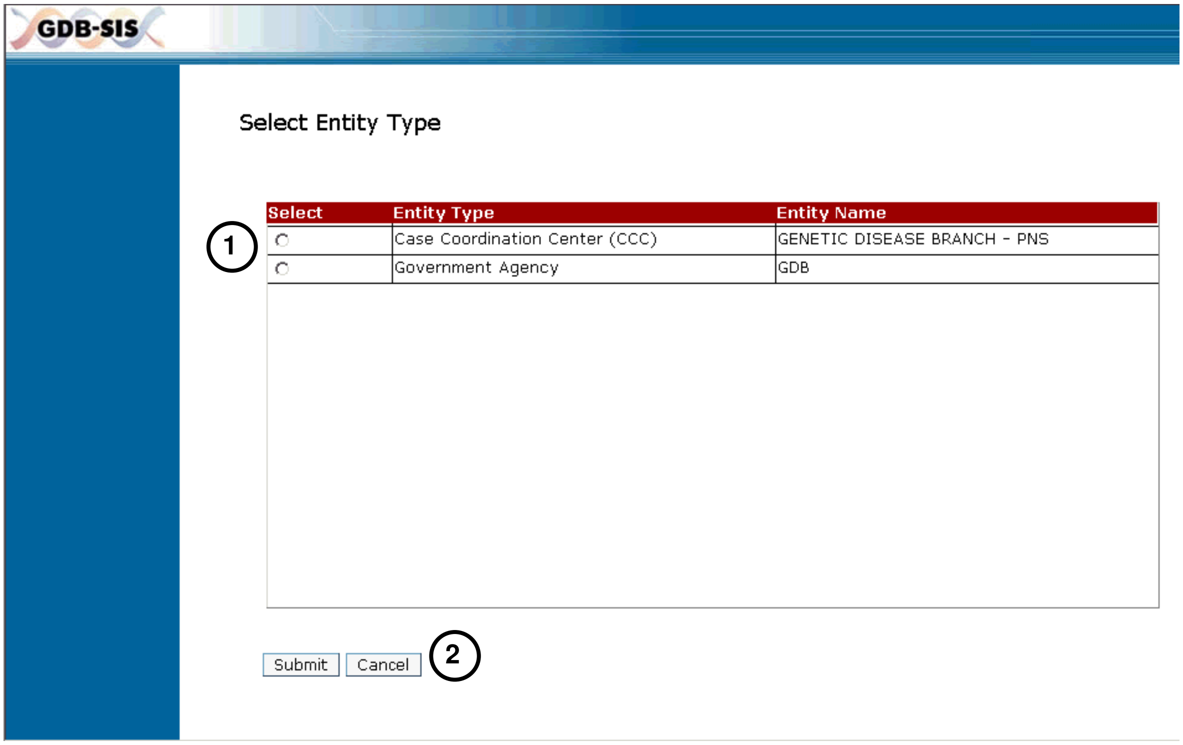
Security Groups (continued)

FIGURE 2

3. You may also update an existing security group's **Group Name** and/or **Group Description**. The **Group ID** field is read-only, and cannot be edited.
4. **Buttons:**
   a. Click the **Update** button to update the security group profile, once you've edited the Group Name or Description.
   b. Click the **Back** button to return to the View Security Groups screen, discarding any unsaved changes.

Select Entity Type

The **Select Entity Type** screen is used by all SIS users and is displayed immediately after entering your User Sign in ID and Password. If you have access rights in SIS to login as more than one entity type, you can select which entity you would like to login as using this screen.

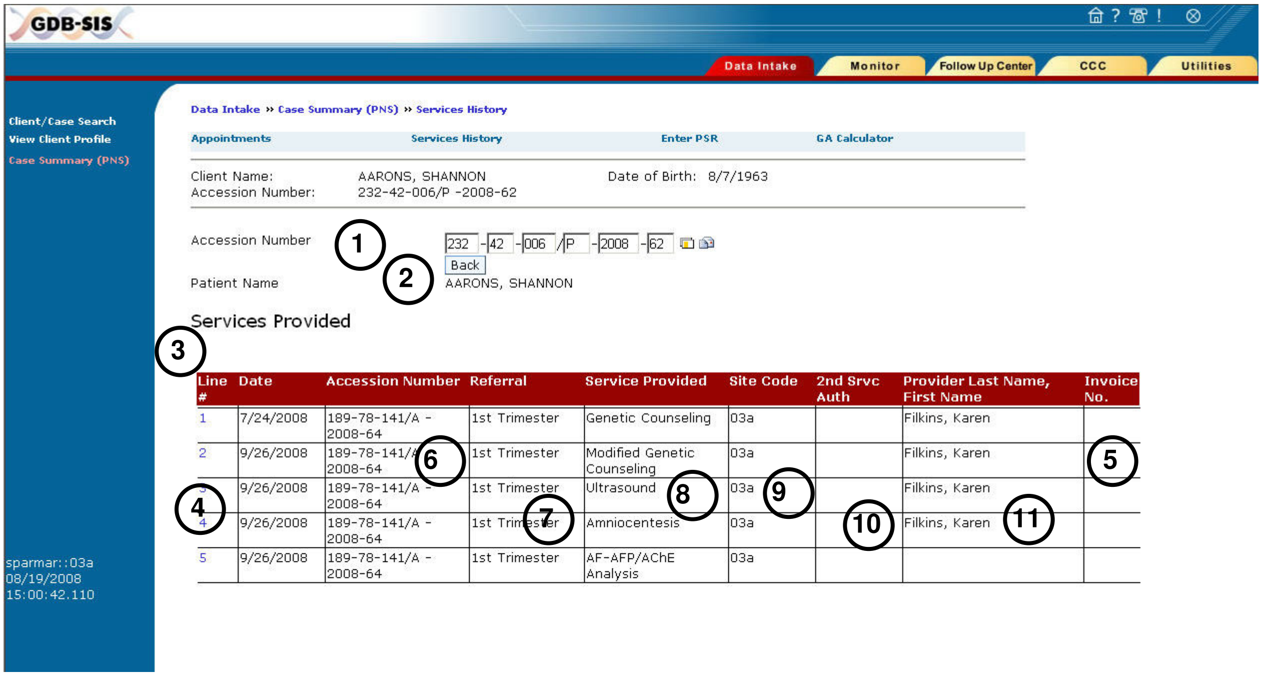


1. Select your **Entity Type** from the grid.
2. **Buttons:**
    a. **Submit** – once you have selected your entity, click the Submit button to proceed to your SIS welcome screen. The welcome screen is based on your Entity Type.
    b. **Cancel** – cancel your selection and return to the SIS Sign-in screen.

Services History

Data Intake >> Case Summary (PNS) >> Services History

The **Services History** screen is used to view all of the services that have been performed by a PDC for a given patient or case. To view this screen click on the **Services History** link at the top of the Case Summary (PNS) screen for the selected patient.



1. **Accession Number** will be auto-populated based on the Case Summary (PNS) screen.
2. Click the **Back** button to return to the **Client/Case Search** screen.
3. The **Services Provided** grid displays all of the services that were performed by the PDC and entered on the PSR for the selected case.
4. Click the **Line #** link (1, 2 etc.) to go to the associated PSR service screen.
5. Click the **Invoice No.** link to go to the Remittance ID Status screen and display information pertinent to the selected invoice.
6. All accession numbers related to case will be displayed.
7. **Trimester** for related accession number will be displayed.
8. **Service Provided** name will be displayed.

   Following new 1st Trimester services will be listed on this screen:

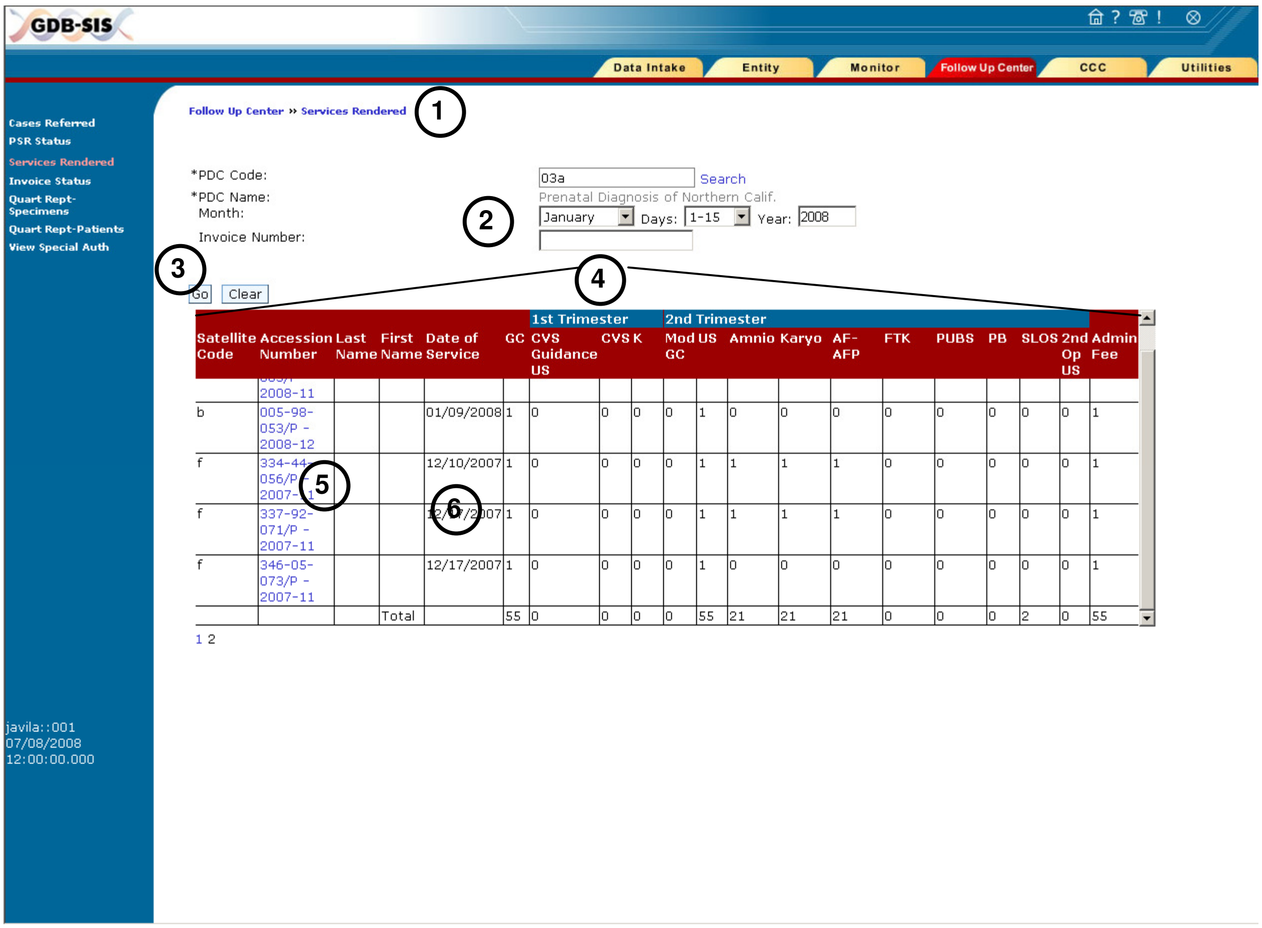
   - 1st T GC
   - US
   - Amnio
   - KA
   - AF

9. **PDC Code** will be displayed.
10. **2nd service authorization** will be displayed.
11. **Provider** name will be displayed.

Services Rendered

Follow Up Center >> Cases Referred >> Services Rendered

The **Services Rendered** screen is used to display a summary of all services that have been provided by a given PDC and submitted to BSS for payment during a given time frame. Once a search has been performed the results are displayed by Satellite Code in a grid.



1. Navigation and screen name.
2. Specify the search criteria for the services you wish to display. **PDC Code, Month, Day** and calendar **Year** are required fields. You may also enter a Remittance ID. Services rendered can be viewed for two bi-weekly periods each month (1^{st} – 15^{th} and 16^{th} – 31^{st}).
   - All eligible PSRs with an "inconsistency resolved date" that falls within the two weeks preceding the date the Business Services System (BSS) interface runs (on the 1^{st} and 16^{th} of each month) will be sent from SIS to BSS for payment processing.

Services Rendered (continued)

3. **Buttons:**
    a. **Go** - click the **Go** button to search for a summary of the services provided, based on the specified criteria.
    b. **Clear** - click the **Clear** button to clear the search criteria you entered above.
4. **Search results** grid displays totals for each satellite of the specified PDC. Services are grouped based on trimester under the headings "1st Trimester" and "2nd Trimester". Following new services are listed along with the existing services.

    a. CVS Guidance US

    b. CVS

    c. K (Karyotype by CVS)

    d. Mod GC (Modified GC)
5. Click the **Accession Number** link to view the Case Summary (PNS) screen for the selected case. You can click the Enter PSR link on the Case Summary (PNS screen) to verify services that were entered on the PSR.
6. **Date of Service** column shows service provided date.

Set Case Alerts

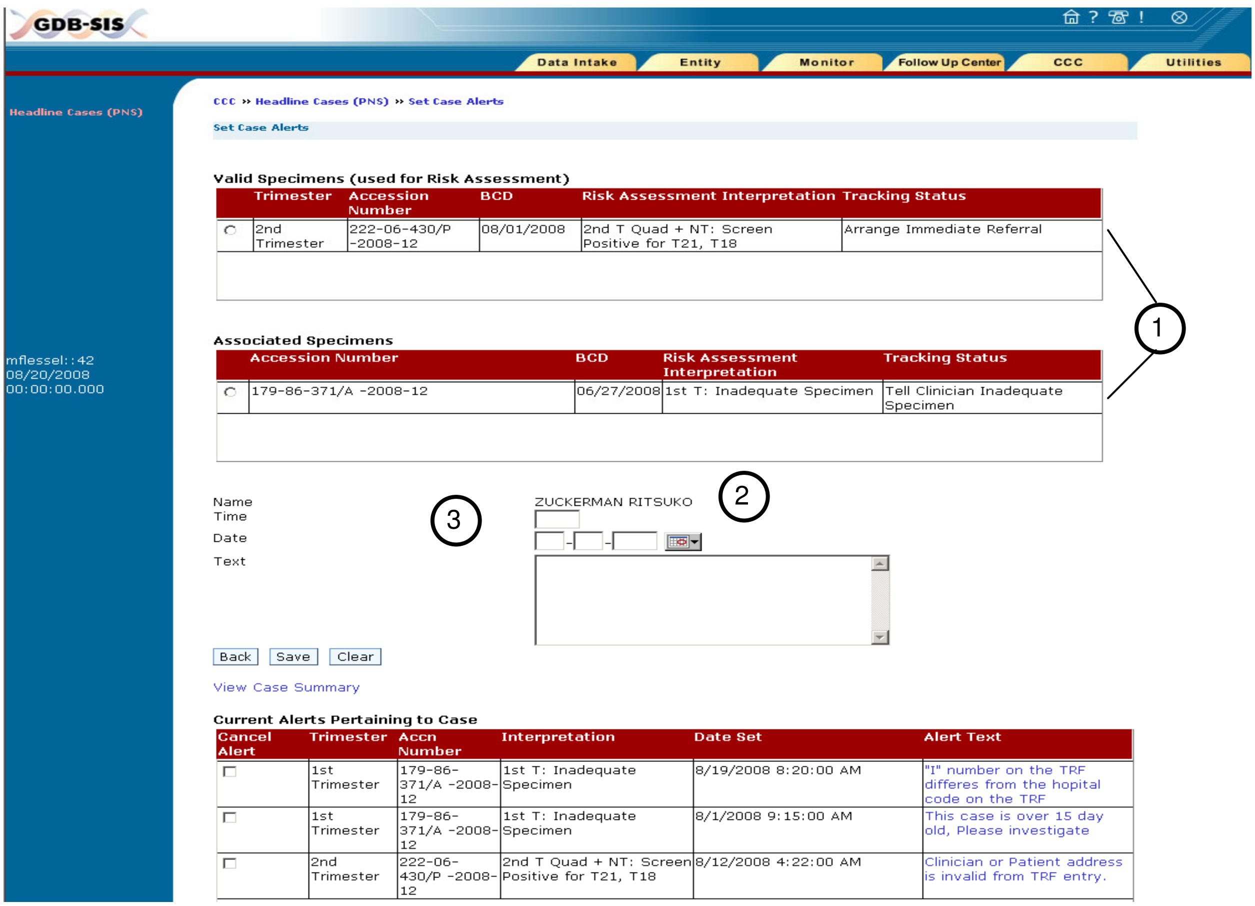
CCC >> Headline Cases (NBS) >> Set Case Alerts

OR

CCC >> Headline Cases (PNS) >> Set Case Alerts

This screen allows selected users to create and set an alert (custom alert) as a future reminder to take action on a case. The user has the ability to specify the alert text, and the date and time at which the alert should be triggered. The CCC may navigate to this screen by clicking the Set Case Alert 3rd level link on the Headline Case screen. The user can also view all the alerts (custom and pre-defined) set for a case based on access levels. User can navigate from case summary or headline case grid.

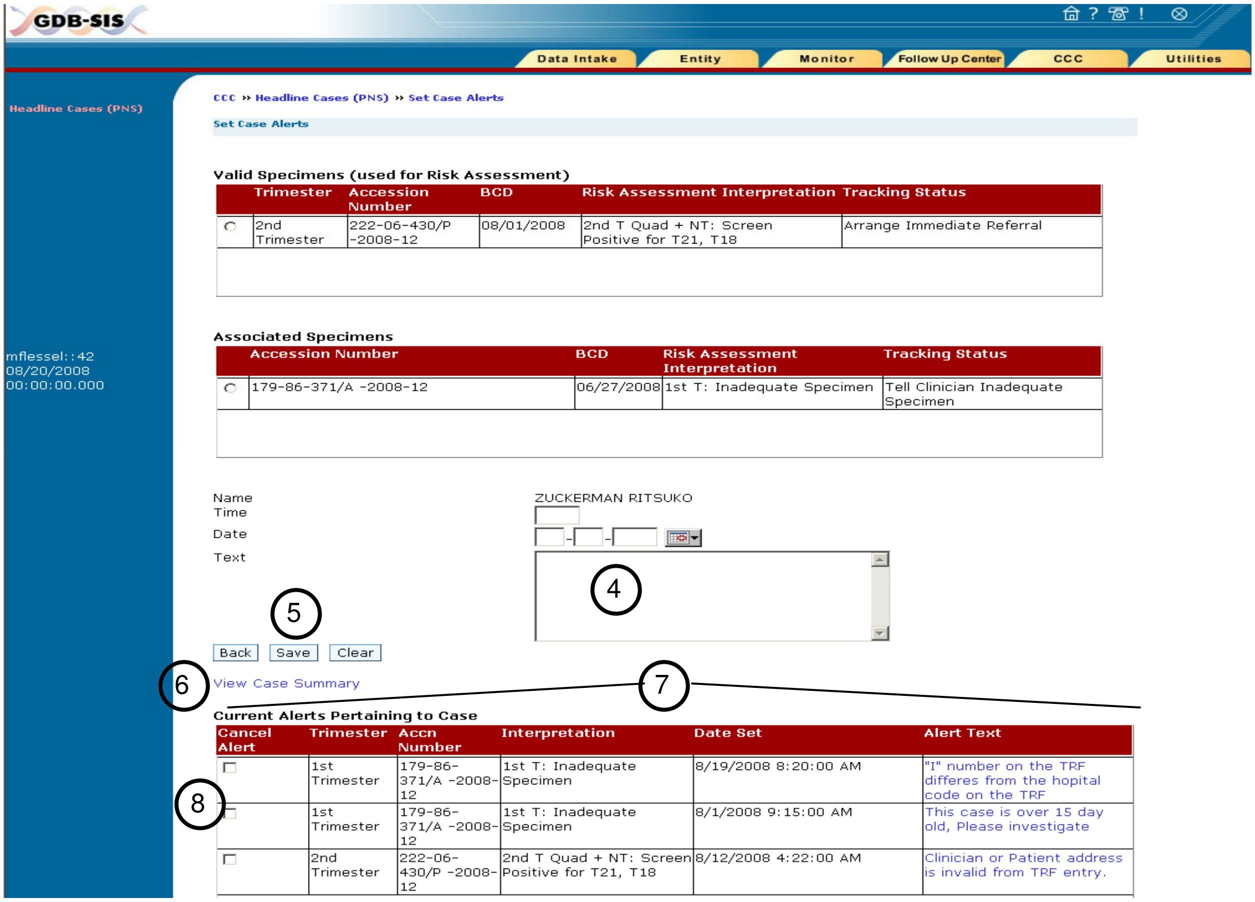
FIGURE 1



1. The screen displays the **Valid specimens** and **Associated specimens** in separate grids on this screen. The user will need to select an accession number to which a new alert needs to be associated to.
2. The client **Name** is displayed in a read-only format.
3. When entering a custom alert, select accession number, enter the **Time** and **Date** upon which the alert should be triggered in the **Time** and **Date** fields. You may also use the calendar function for convenience. Note the time is in 24-hour format. When viewing an alert that has already been triggered, the time and date will be displayed in a read-only format.

Set Case Alerts (Continued)

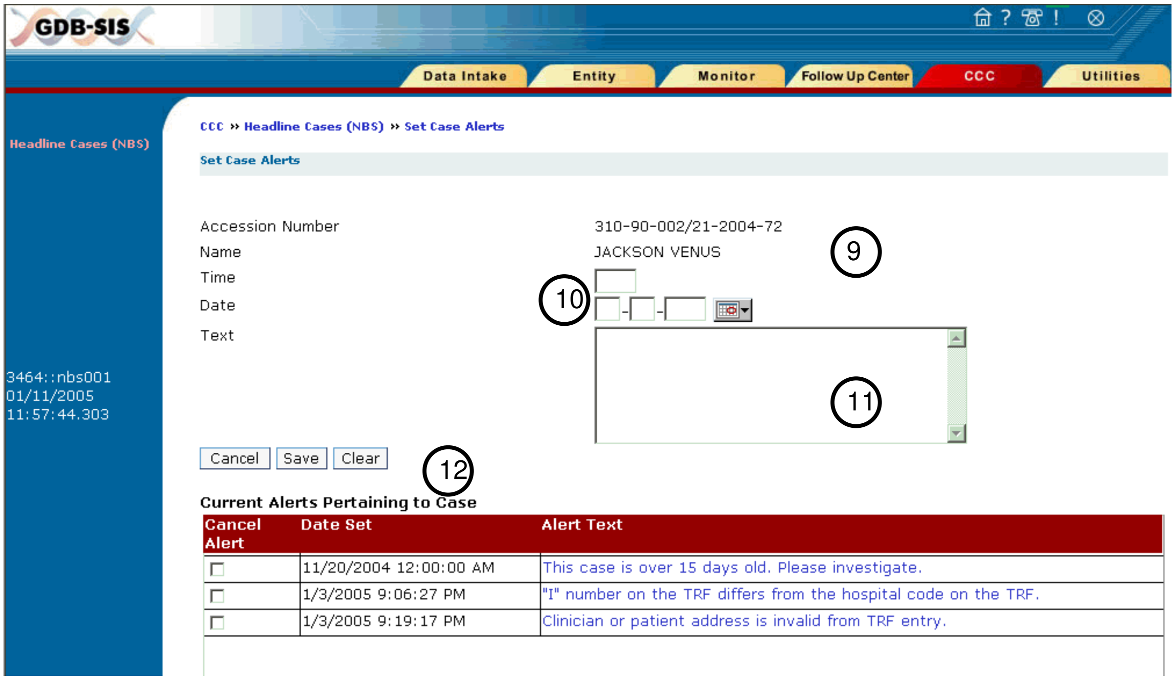
FIGURE 2



4. You may enter, update or view the alert text in the **Text** field for a custom alert. Or, if you are viewing a pre-defined system generated, the alert text will be displayed in a read-only format.
5. **Buttons**:
    a. **Cancel** – cancels your actions without saving.
    b. **Save** – Saves a new alert, or saves the changes to an existing alert.
    c. **Clear –** clears the fields without saving.
6. **View Case Summary hyperlink** navigates the user to the corresponding case summary screen
7. Existing alerts for the case are displayed in the **Current Alerts Pertaining to Case** grid. If an alert is entered for two different accession numbers, it will be listed twice in the Alerts grid.
8. Click the checkboxes in the **Cancel Alerts** column, then click the Save button to cancel one or more alerts and remove them from the alerts grid.

Set Case Alerts (Continued)

FIGURE 3

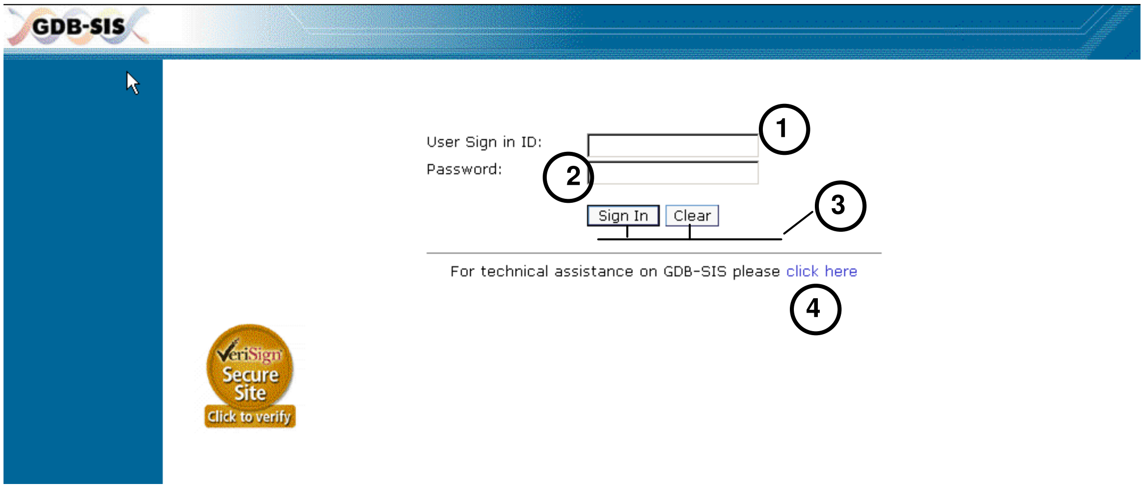


For Pre PEII or NBS case screen will be displayed as Figure 3

9. The client **Accession Number** and **Name** are displayed in a read-only format.
10. When entering a custom alert, enter the time and date upon which the alert should be triggered in the Time and Date fields. You may also use the calendar function for convenience. Note the time is in 24-hour format. When viewing an alert that has already been triggered, the time and date will be displayed in a read-only format.
11. You may enter, update or view the alert text in the **Text** field for a custom alert. Or, if you are viewing a pre-defined system generated, the alert text will be displayed in a read-only format.
12. **Buttons**:
    a. **Cancel** – cancels your actions without saving.
    b. **Save** – Saves a new alert, or saves the changes to an existing alert.
    c. **Clear –** clears the fields without saving.

SIS Sign-In

This screen acts as the gatekeeper for SIS. It requires input of a personal User Sign in ID, and a personal Password to access the system. Your ID and password determine the screens to which you will have access.



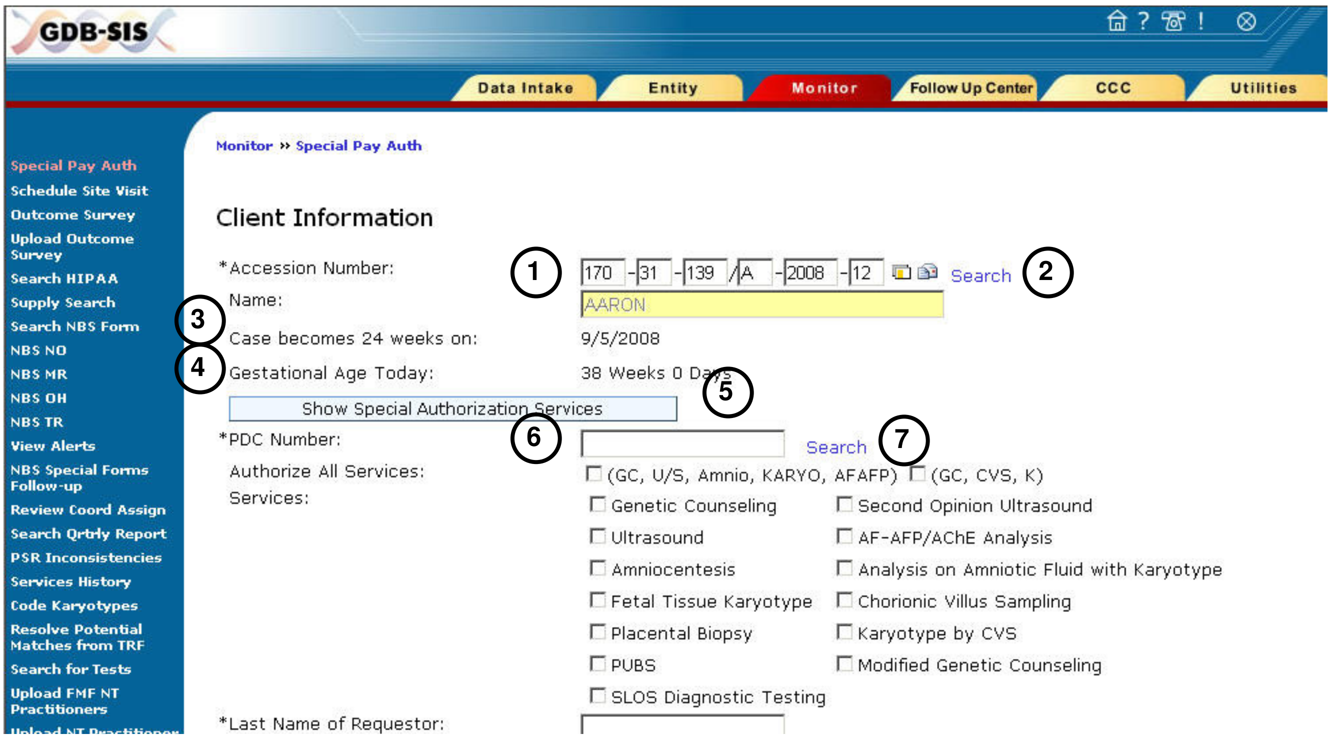
1. Enter your personal ID in the **User Sign in ID**
2. Enter your personal password in the **Password** field.
3. **Buttons**:
    a. Click **Sign In** button to log into SIS.
    b. The **Clear** button clears entered fields.
4. For technical assistance, for example, if you are unable to log in, click the "click here" link.

Special Payment Authorization

Monitor >> Special Pay Auth

The **Special Pay Auth** screen is used to record authorization for, or denial of a special service for a given accession number. In addition, you can view special payments that have already been authorized and/or denied for an accession number.

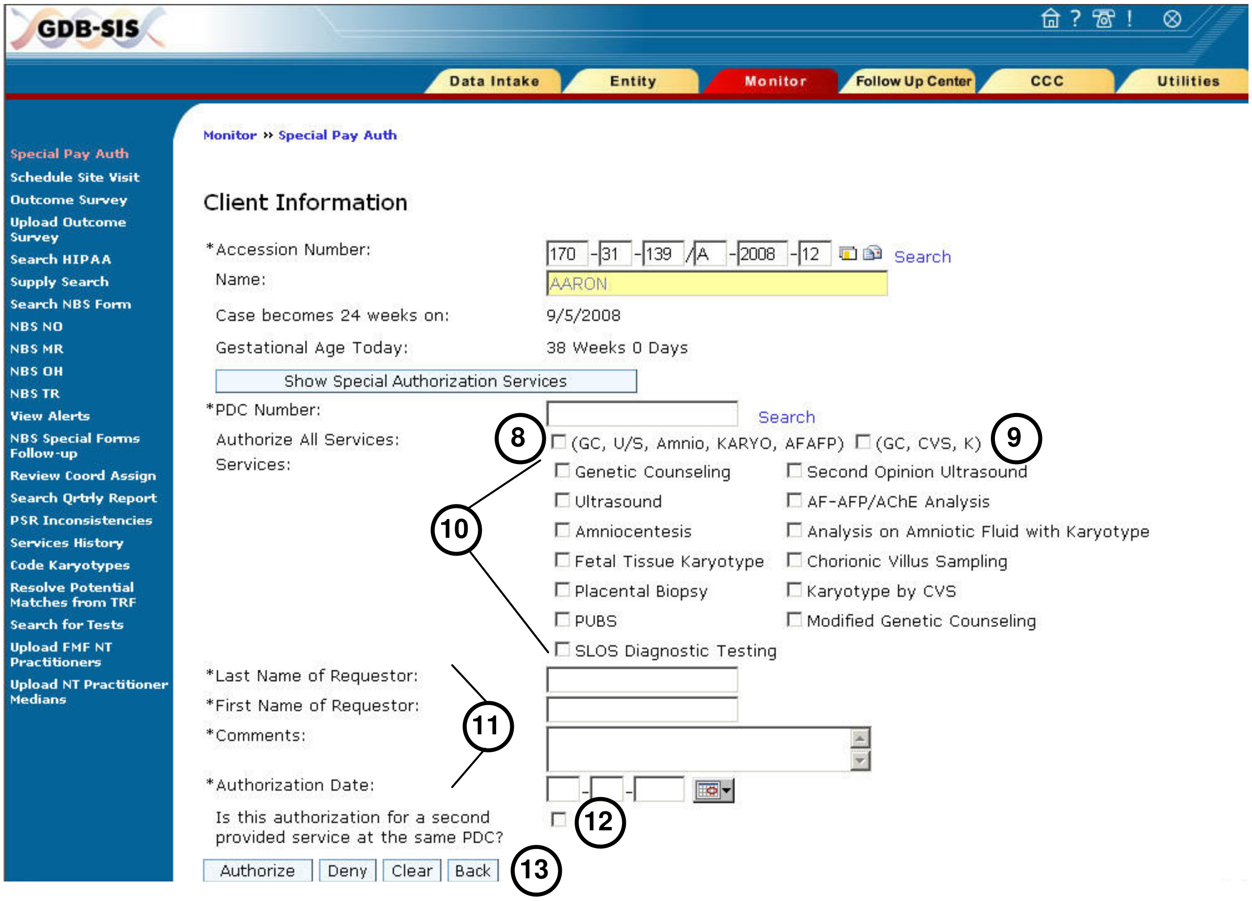
FIGURE 1



1. The **Accession Number** field is required to enter or view special service authorizations. The Client Name may also be entered.
2. Clicking the **Search** link will allow you to search for an Accession Number using the Client/Case Search screen.
3. This field displays the date on which the case attains 24 weeks Gestational Age.
4. This field displays the Gestational Age of the case on the Login Date.
5. To View Existing Special Service Authorizations or Denials: Click the **Show Special Authorization Services** button to display the History of Special Payment Authorizations grid (see **FIGURE 3**) for the Accession Number you have entered.
6. To Enter Special Service Authorizations or Denials: The **PDC Number** field is required in order to record authorization or denial of a service for the accession number you have entered.
7. Click the **Search** link to search for a PDC number.

Special Payment Authorization (continued)

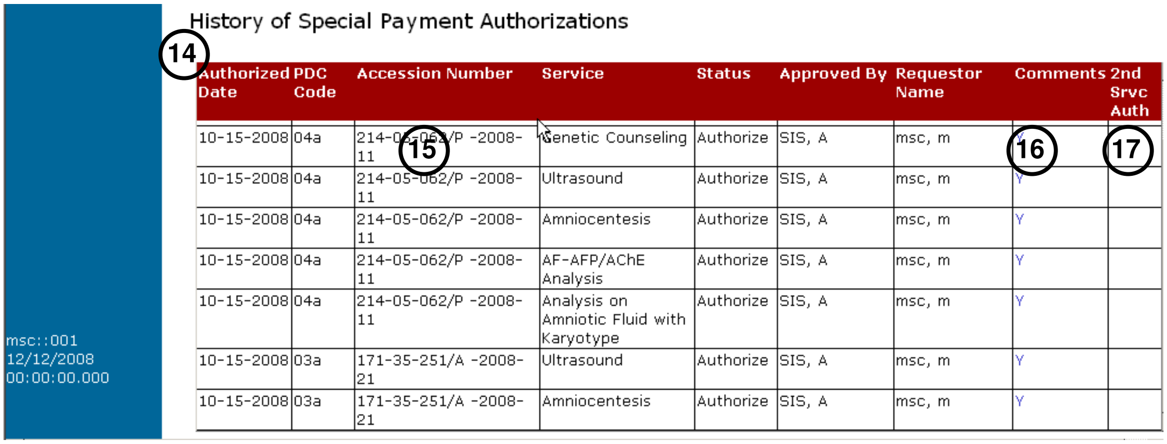
FIGURE 2



8. Click the **Authorize All 2nd Trimester Services** checkbox (GC, U/S, Amnio, Karyo, AF-AFP) to select all of the following services: Genetic Counseling, Ultrasound, Amniocentesis, Karyotype, AF-AFP/ AChE Analysis to authorize or deny all services.
9. Click the **Authorize All 1st Trimester Services** checkbox (GC, CVS, K) to select all of the following services: Genetic Counseling, Chorionic Villus Sampling, Karyotype by CVS to authorize or deny all services.
10. Click the checkbox next to the individual service(s) you wish to authorize or deny.
11. **Last Name of Requestor**, **First Name of Requestor**, **Comments** and **Authorization Date** are required fields.
12. Select this checkbox if the Special Authorization is for a 2nd Authorized service at the same PDC. This results in the creation of a new referral and a new PSR for the specimen.
13. **Buttons:**
    a. Click the **Authorize** button to authorize the selected services.
    b. Click the **Deny** button to deny the selected services.
    c. Click the **Back** button to return to the previous screen.

Special Payment Authorization (continued)

FIGURE 3



Authorized Date	PDC Code	Accession Number	Service	Status	Approved By	Requestor Name	Comments	2nd Srvc Auth
10-15-2008	04a	214-0[illegible]/P -2008-11	Genetic Counseling	Authorize	SIS, A	msc, m	Y	
10-15-2008	04a	214-05-062/P -2008-11	Ultrasound	Authorize	SIS, A	msc, m	Y	
10-15-2008	04a	214-05-062/P -2008-11	Amniocentesis	Authorize	SIS, A	msc, m	Y	
10-15-2008	04a	214-05-062/P -2008-11	AF-AFP/AChE Analysis	Authorize	SIS, A	msc, m	Y	
10-15-2008	04a	214-05-062/P -2008-11	Analysis on Amniotic Fluid with Karyotype	Authorize	SIS, A	msc, m	Y	
10-15-2008	03a	171-35-251/A -2008-21	Ultrasound	Authorize	SIS, A	msc, m	Y	
10-15-2008	03a	171-35-251/A -2008-21	Amniocentesis	Authorize	SIS, A	msc, m	Y	

14. All of the special services that have been authorized and/or denied for the case (specimen plus associated specimens) are displayed in the **History of Special Payment Authorization** grid, which is displayed when you click on the **Show Special Authorization Services** button.
15. The accession numbers for all the specimens which have a special authorization/ or denial is displayed in the grid.
16. Click the “Y” hyperlink in the **Comments** column for a given authorization/denial record to modify the record (Last Name of Requestor, First Name of Requestor, Comments or Authorization Date), or to update the authorization or denial status.
17. If the special authorization is for a 2nd service at the same PDC, then this column is populated with a value ‘Y’.

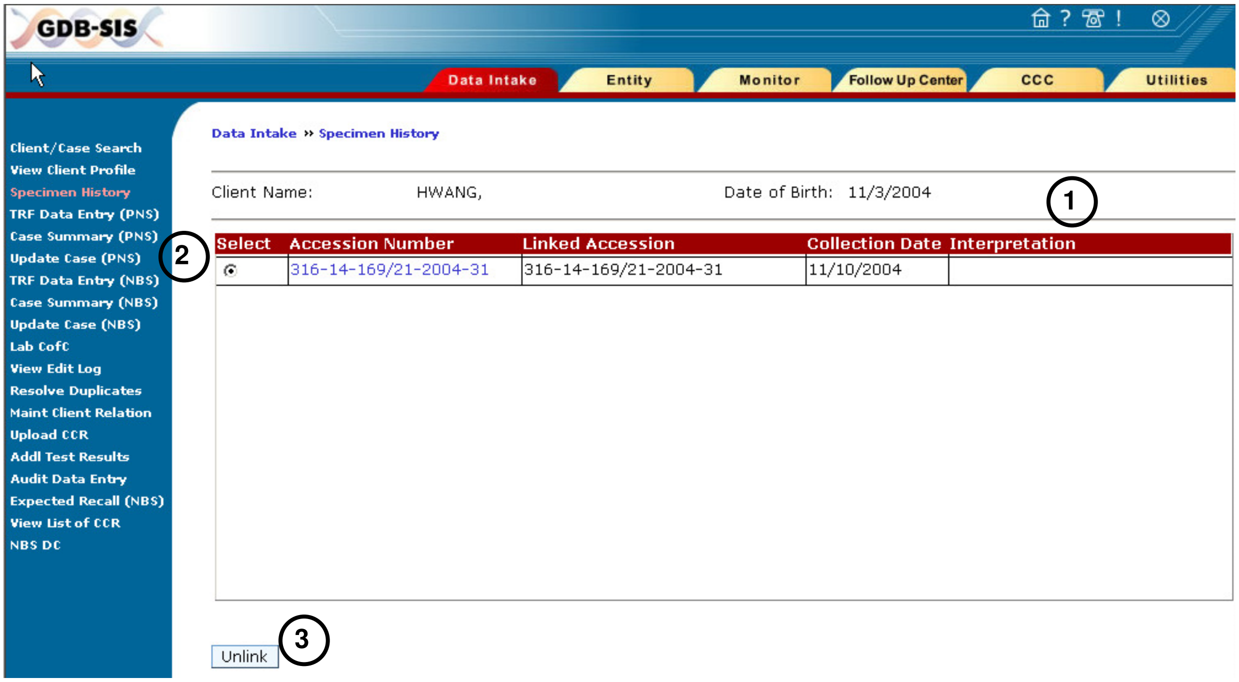
Note: SIS will not allow you to create two authorization/denial records for a service. Instead, you must use the ”Y” link to update the existing record.

Specimen History

Data Intake >> Specimen History

This screen displays a history of all accession numbers related to a client. From this screen, you can unlink an accession number from a client. You will then be able to search for a different client with whom to link to the Accession Number.

In both cases the **Specimen History** screen will be displayed for the current client (not the selected or new client).



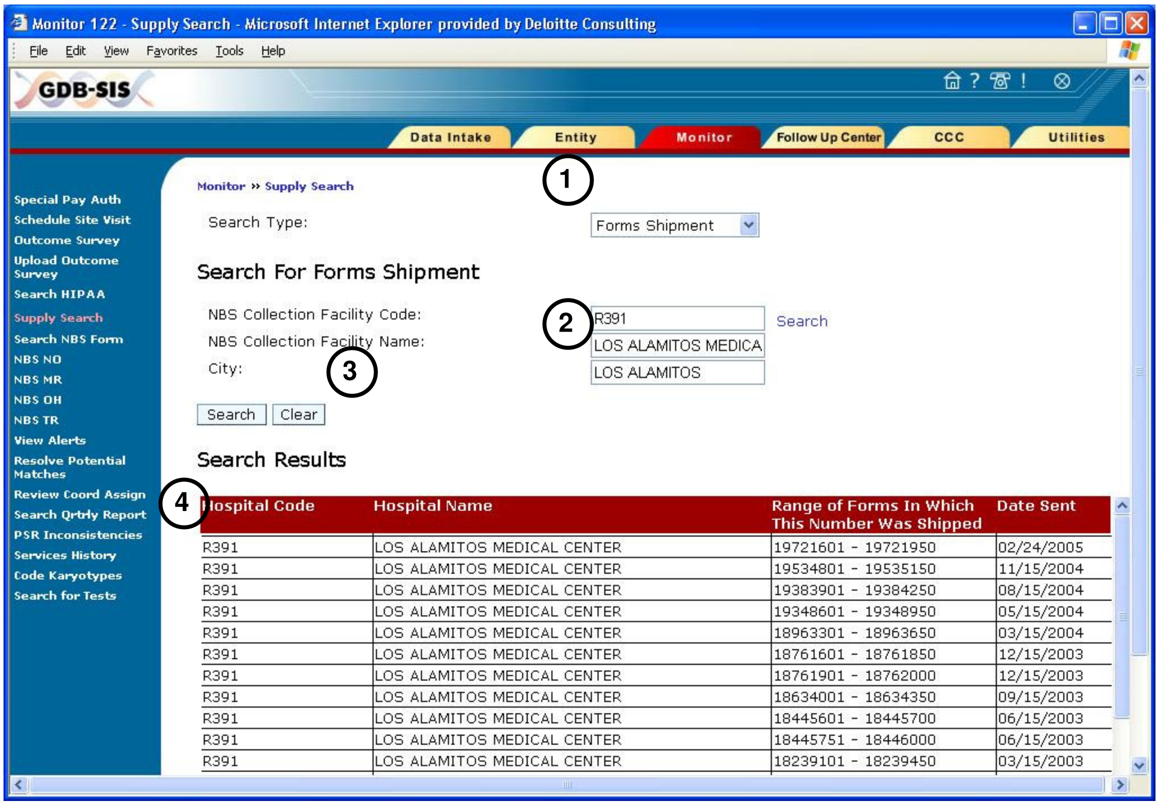
1. Client Information.
2. Specimen History data. For PNS, the grid row will be ordered by accession number. For NBS the order is by collection date.
3. Click the radio button next to a Specimen History grid entry and click the **Unlink** button to unlink the Accession Number from the client.
    a. Clicking the Unlink button again will redirect you to the Client/Case Search screen to search for a client with whom the Accession Number can be linked. Click the Save button on the Client/Case Search screen to link the accession to the new client.
    b. If you cannot find a client with whom to link the Accession Number, you may create a new client by clicking the New button on the Client/Case Search screen. You will be redirected to the Create/Update Client Profile screen to add a new user.

Supply Search

Monitor >> Supply Search

This screen allows you to search for supply items either by Form Shipment or Assigned Providers. A different search form is displayed depending on which search type is selected.

FIGURE 1



1. A different search form is displayed for “Forms Shipment” and “Assigned Provider,” depending on which **Search Type** is selected.
2. **Search For Forms Shipment** criteria: Click the **Search** link to obtain the **NBS Collection Facility Code**, **NBS Collection Facility Name**, or **City** using the Entity Search screen. Alternatively, you can enter the search criteria into the fields directly.
3. **Buttons:**
    a. **Search** button initiates a search based on any combination of the entered criteria, including a partial name.
    b. **Clear** button clears the information from all search criteria fields. The Search Results grid will remain on the screen.
4. **Search Results** grid displays the range of form numbers shipped to the selected facility. Clicking on the header of a Search Results column will sort the data grid by that column.

Tracking Events

Data Intake >> Case Summary (PNS) >> Tracking Events

OR

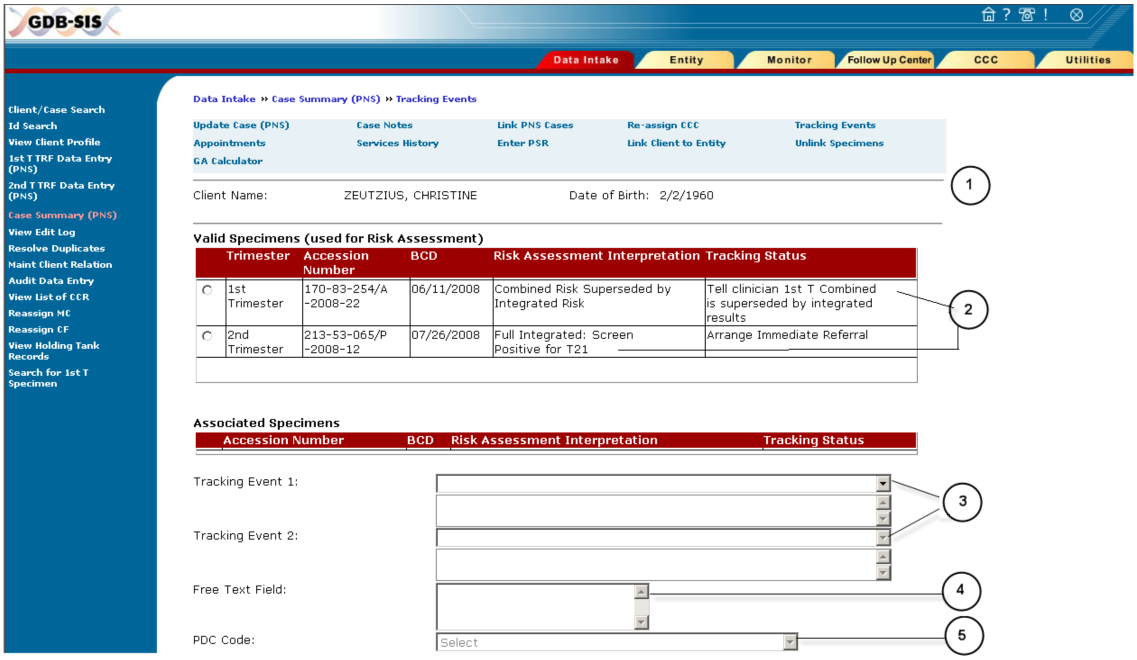
Data Intake >> Case Summary (NBS) >> Tracking Events

The **Tracking Events** screen is used to view and record actions that have been associated with the case record. Diaried Events can also be viewed from this screen. Diaried Events is a log of all events (including Tracking Events and system generated events) associated with the case. The Tracking and Diaried Events grid can be used to view the history of the case.

The write-up below is for Post go-live specimens, the Pre go-live is explained after the Post go-live as nothing much has changed for Pre go-live specimens.

Tracking Events (continued)

FIGURE 1



1. Client information is displayed in a read-only format based on the client profile.

2. The **Interpretation** and current **Tracking Status** is displayed for each valid and associated specimen in the case in a read-only format. The **Tracking Status** is based on actions made for a specimen, including tracking events and selected Diaried events. This information is shown per-specimen basis.

3. The desired tracking event can be selected from the dropdown box in the **Tracking Event 1** and **Tracking Event 2** fields. It is necessary to select the specimen for which the Tracking event is being raised before clicking on **Save TE** button.

   Only two tracking events can be saved at once. To enter more than two, you must first click the **Save TE** button (see Figure 2) then enter

   additional tracking events. A tracking event is not required at all times. If a user wishes to send out a modified mailer, the user may ignore the entry of tracking events and simply enter the contact information fields and press **Generate Mailer** button (see Figure 2).

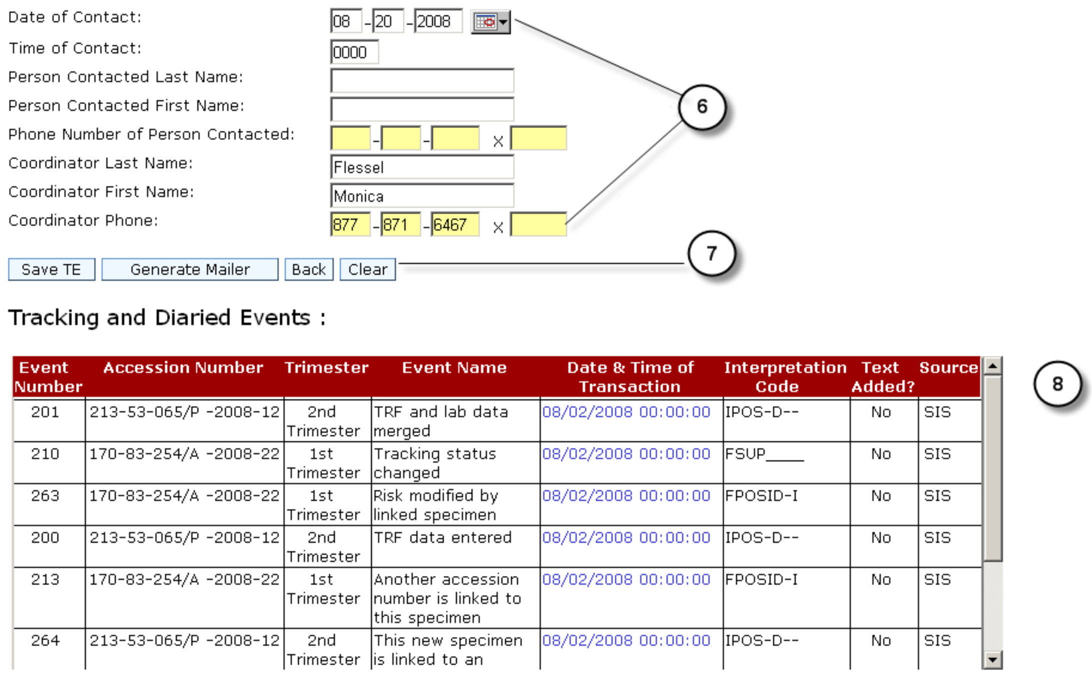
4. Notes or comments can be entered into the **Free Text Field**. This field is used to add addendum to the confirmation of contact or modified mailer. When the mailer is sent, this text will be added to the mailer.

5. Select from the dropdown boxes for referred locations.

   Note: All the PDCs which offer CVS are displayed in the format of “<PDC Legacy Code> - <PDC Name> - <CVS=Yes>”, otherwise the PDCs are displayed in the regular format of “<PDC Legacy Code> - <PDC Name>”

Tracking Events (continued)

FIGURE 2



6. If a mailer is to be generated or a Tracking event which requires contact information is raised, fill in the contact information.

7. **Buttons:**

   a. **Save TE:** This will update the **Tracking and Diaried Events** grid below.

   b. **Generate Mailer:** This will generate a mailer.

   c. **Back:** This takes you back to the previous screen.

   d. **Clear:** This clears the screen and cancels the entire operation.

8. The Tracking and Diaried Events grid

   This grid shows the total list of tracking events raised till date for the case. Some of the new columns added are the “Event number”, “Accession Number” and “Trimester”.

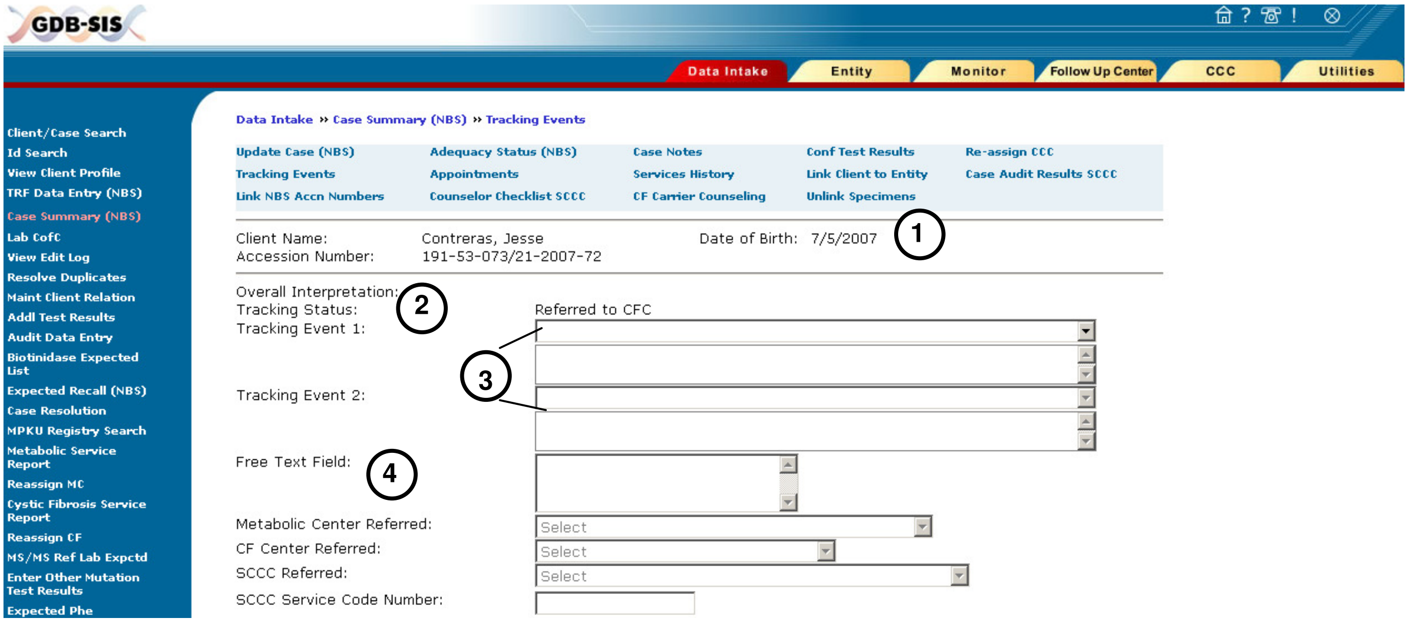
   The columns “Event number”, “Accession Number”, “Trimester” and “Date & Time of transaction” can be sorted i.e. clicking on any of these columns once, sorts the data in the column in ascending order and clicking again sorts the data in descending order.

   Also, clicking on any of the event dates, takes the user to the “Case Summary” screen which displays the information “as-of” the date selected (i.e. the way the case looked on that date).

Tracking Events (continued)

Now, we can look at the PNS Pre go-live and NBS specimens

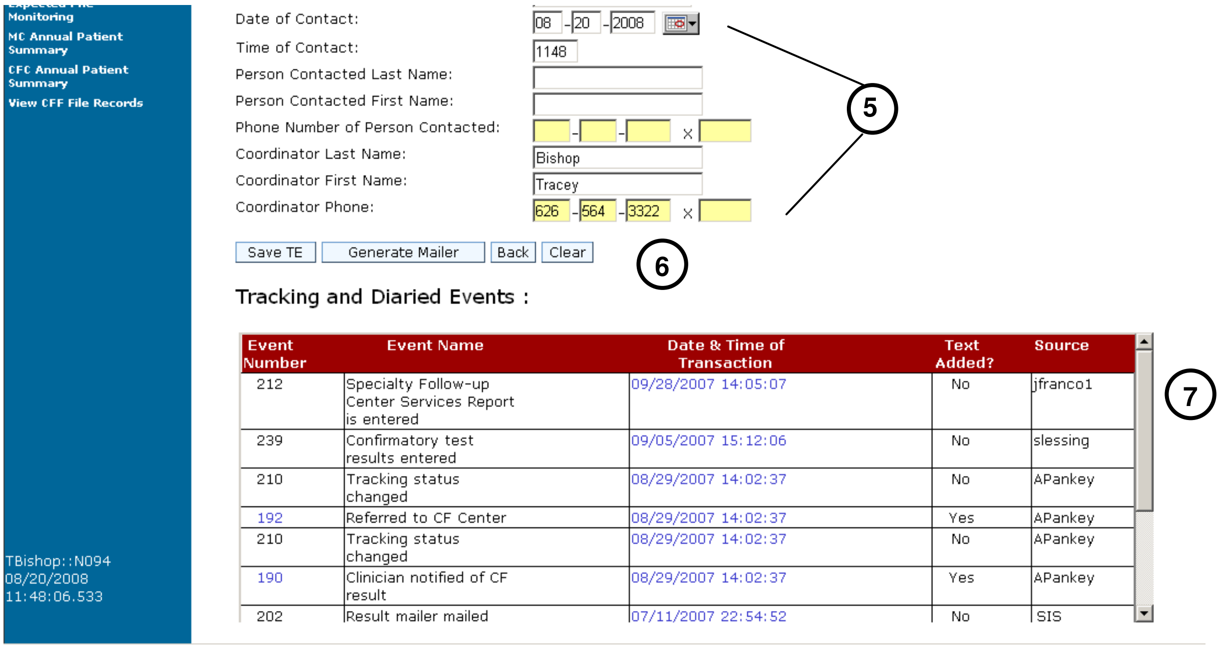
FIGURE 3



1. Client information is displayed in a read-only format based on the client profile.
2. The **Overall Interpretation** and current **Tracking Status** are displayed in a read-only format. **Tracking Status** is based on actions made for a case, including tracking events and selected Diaried events.
3. The desired tracking event can be selected from the dropdown box in the **Tracking Event 1** and **Tracking Event 2** fields. Only two tracking events can be saved at once. To enter more than two, you must first click the **Save TE** button (see Figure 2) then enter additional tracking events. A tracking event is not required at all times. If a user wishes to send out a modified mailer, the user may ignore the entry of tracking events and simply enter the contact information fields and press **Generate Mailer** button (see Figure 2).
4. Notes or comments can be entered into the **Free Text Field**. This field is used to add addendum to the confirmation of contact or modified mailer. When the mailer is sent, this text will be added to the mailer.

Tracking Events (continued)

FIGURE 4



5. If a mailer is to be generated or a Tracking event which requires contact information is raised, fill in the contact information.
6. **Buttons:**
   a. **Save TE:** Updates the **Tracking and Diaried Events** grid below.
   b. **Generate Mailer:** Generates a mailer.
   c. **Back:** Takes you back to the previous screen.
   d. **Clear:** Clears the screen and cancels the entire operation.
7. The “Tracking and Diaried Events” grid

   The columns “Event number” and “Date & Time of transaction” can be sorted i.e. clicking on any of these columns once, sorts the data in the column in ascending order and clicking again sorts the data in descending order.

   Also, clicking on any of the event dates, takes the user to the “Case Summary” screen which displays the information “as-of” the date selected (i.e. how the case looked on that date).

Note:

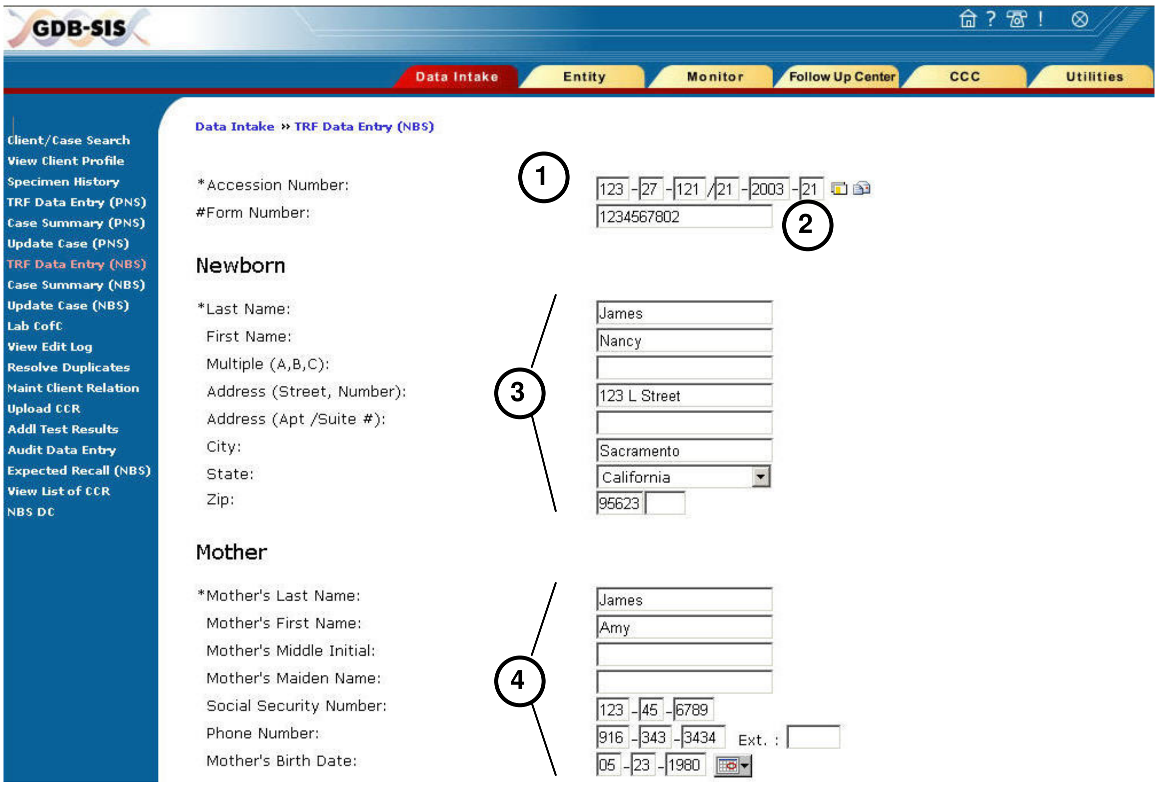
- The above screenshot shows tracking events for a CF case. There are many other tracking events for each NBS disorder. These are listed in the dropdown box.
- For PNS specimens all the PDCs which offer CVS are displayed in the format of “<PDC Legacy Code> - <PDC Name> - <CVS=Yes>”, otherwise the PDCs are displayed in the regular format of “<PDC Legacy Code> - <PDC Name>”.
- The same list of tracking events is displayed for Post go-live and Pre go-live PNS specimen

TRF Data Entry (NBS)

Data Intake >> TRF Data Entry (NBS)

This screen is used to enter Test Request Form (TRF) data via manual keyed data entry for newborn screening tests. Required fields are indicated by the preceding asterisk (*). For key fields, SIS will require you to enter the same information twice. These double-entry fields are indicated with a preceding pound sign (#). While these fields are not required to save a TRF in SIS; if you enter data in these fields you will be required to reenter the information and save again.

FIGURE 1



1. **Accession Number** is a required field.
2. **Form Number** is a double entry field.
3. Newborn Information - **Last Name** is a required field.

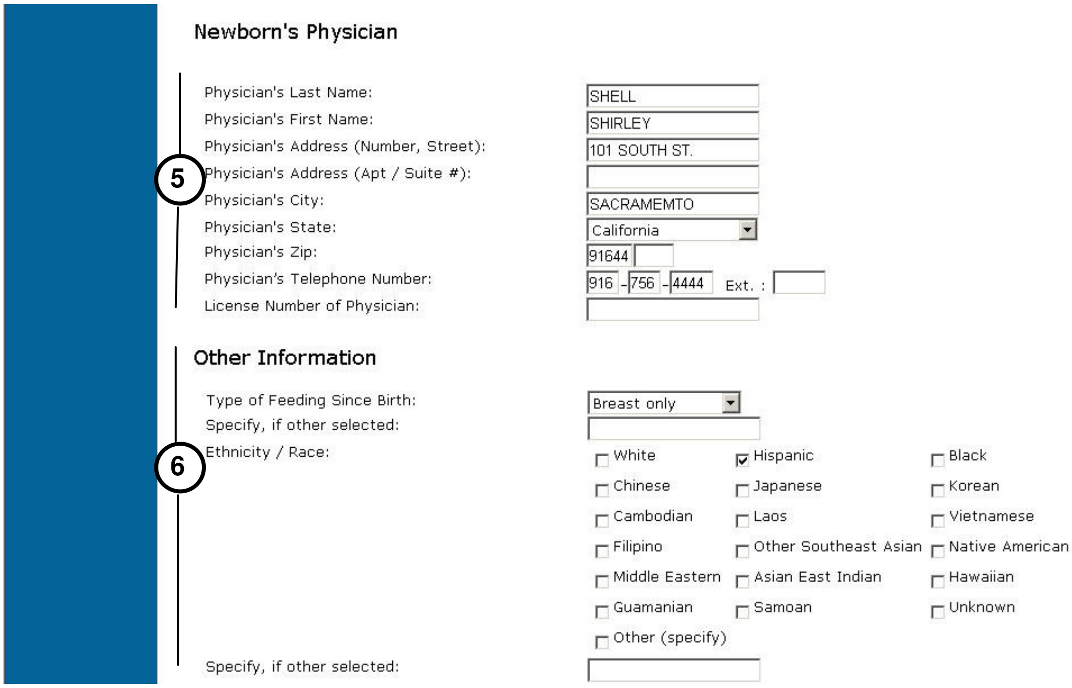
   or

4. Mother's Information – **Mother's Last Name** is a required field.

   (The **Mother's Last Name** or Newborn's **Last Name** must be entered. Both are not required.)

TRF Data Entry (NBS) - (continued)

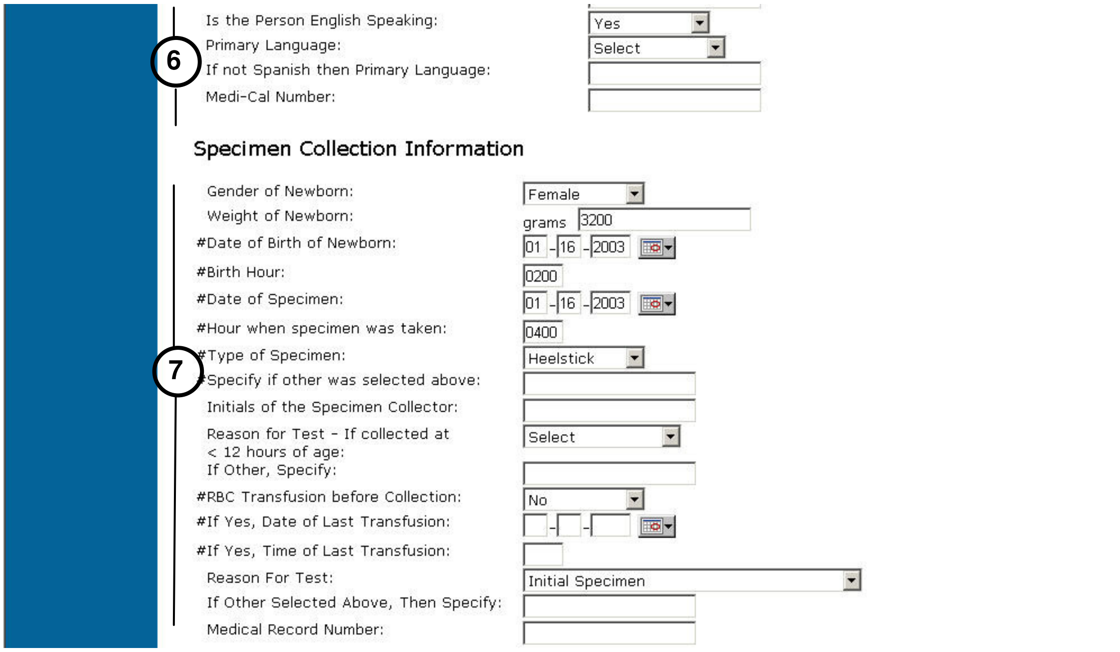
FIGURE 2



5. **Newborn's Physician** Information.
6. **Other Information**. **Ethnicity** / **Race** check boxes – Multiple checks are allowed. You must uncheck a box to de-select it.

TRF Data Entry (NBS) - (continued)

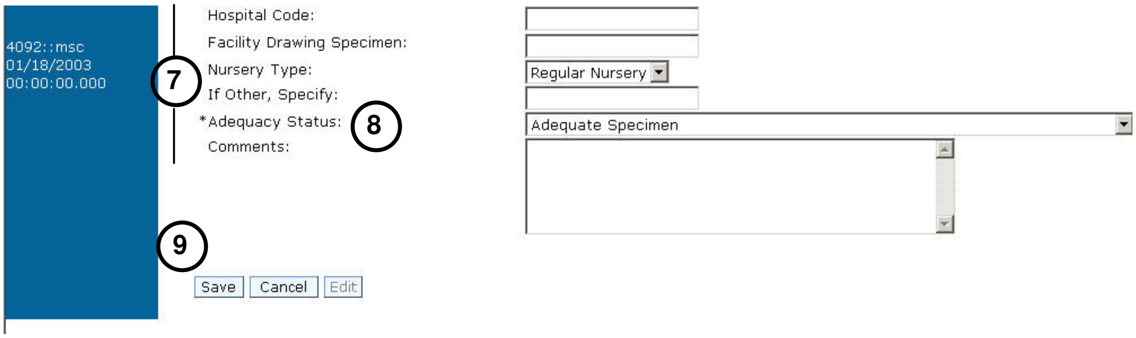
FIGURE 3



7. **Specimen Collection Information** - Double entry is required for:
    a. Date of Birth of Newborn.
    b. Birth Hour (24 hour military format 0000-2359)
    c. Date of Specimen.
    d. Hour when specimen was taken (24 hour military format 0000-2359).
    e. Type of Specimen.
    f. RBC Transfusion before Collection.
        - If Yes, Date of Last Transfusion.
        - If Yes, Time of Last Transfusion.

TRF Data Entry (NBS) - (continued)

FIGURE 4



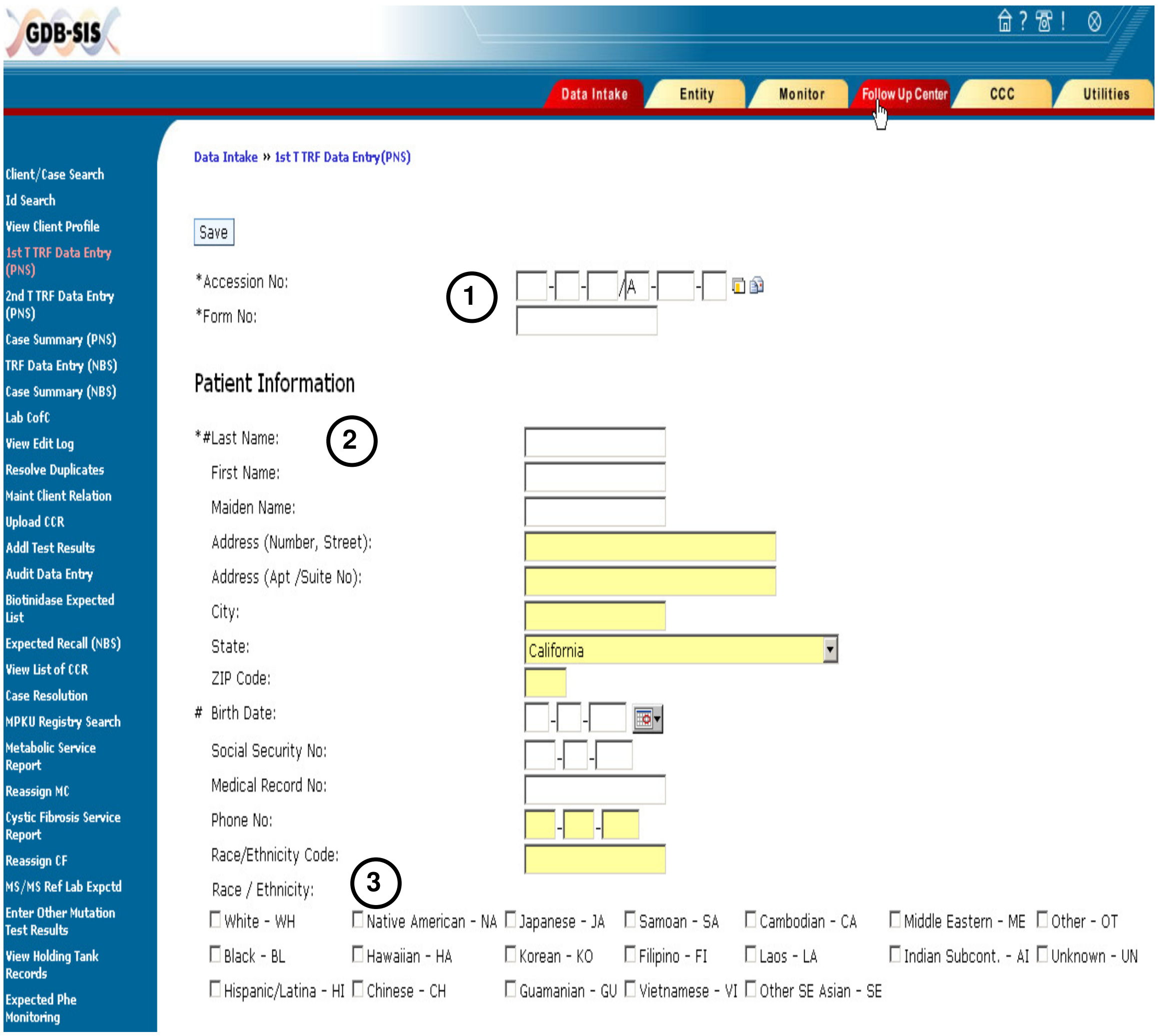
8. **Adequacy Status** is a required field. The adequacy of the entire specimen may be entered. To change the adequacy of an individual analyte the Change Adequacy Status screen may be used.
9. **Buttons:**
    a. **Save** – Saves the TRF data only after the reentry of double entry fields is successful.
    b. **Cancel** – Clears all TRF data entry fields.
    c. **Edit** – Allows editing of data after initial save, as long as you remain on this screen. Once you navigate away from the screen, or begin entering data for another TRF, you will no longer be able to access and edit previous records. (Note: not required to enter double entry fields when editing).
        - To access previously entered TRFs, use the Audit Data Entry screen to make changes to saved data. This type of data entry is only allowed on the same business day the TRF is entered before the 8:00PM cutoff.

1ST T TRF Data Entry (PNS)

Data Intake >> 1st T TRF Data Entry (PNS)

This screen is used to enter 1st Trimester TRF data for prenatal screening tests. Required fields are indicated by the preceding asterisk (*). For key fields, SIS will require you to enter the same information twice. These double-entry fields are indicated with a preceding pound sign (#). While these fields are not required to save a TRF in SIS, if you enter data in these fields, you will be required to re-enter the information and save again to permanently save the data.

FIGURE 1



1. **Accession Number** and **Form Number** are required fields.
2. **Patient Information:**

   a. **Last Name** is a required field.

   b. **Birth Date** is a double-entry field.

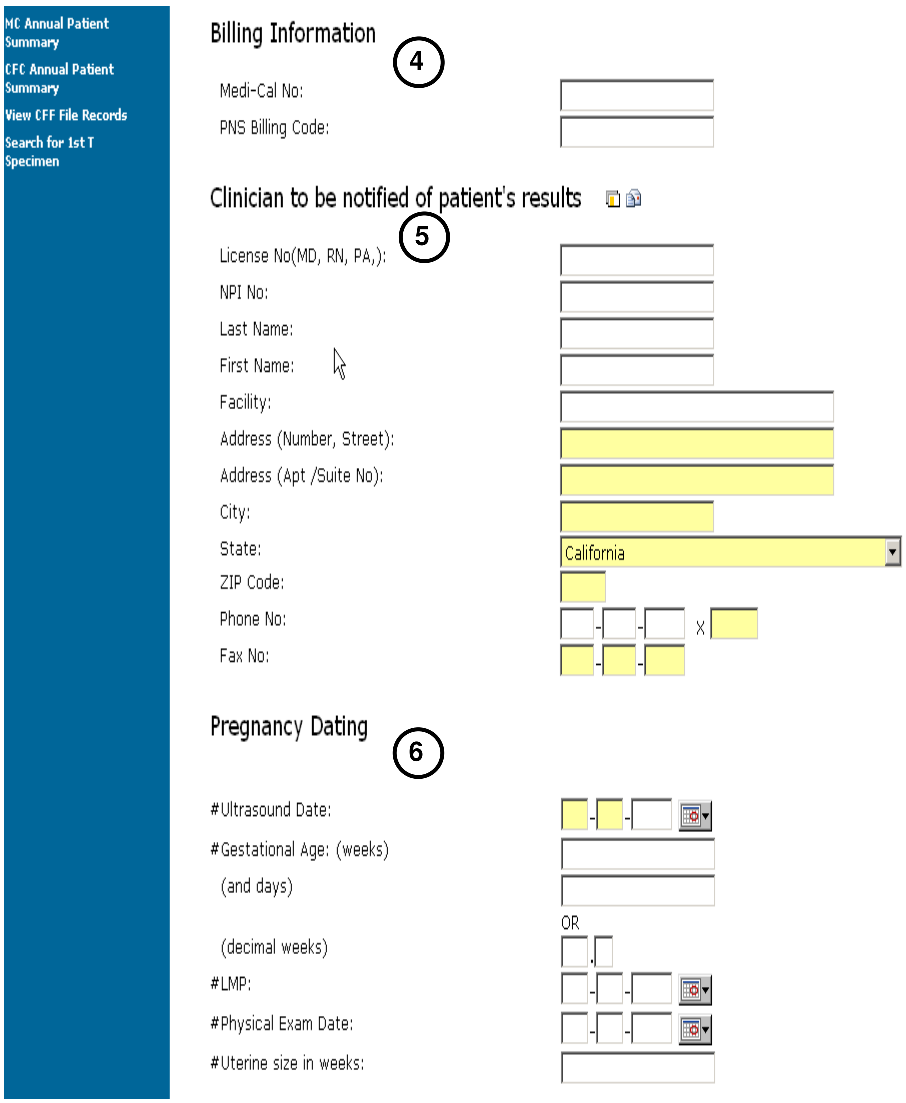
TRF Data Entry (PNS) - (continued)

3. **Race/Ethnicity** Code and check boxes:

   a. Code is entry field and you can enter the race/ethnicities by code (two characters) in the comma delimited format with no space. The entered values will be selected in the checkbox.

   b. Multiple checks are allowed. You must uncheck a box to de-select it or remove the code from entry field.

FIGURE 2



4. **Billing Information:** Enter billing information and billing code.
5. **Clinician to be notified of patient's results**: Fill in all areas.

TRF Data Entry (PNS) - (continued)

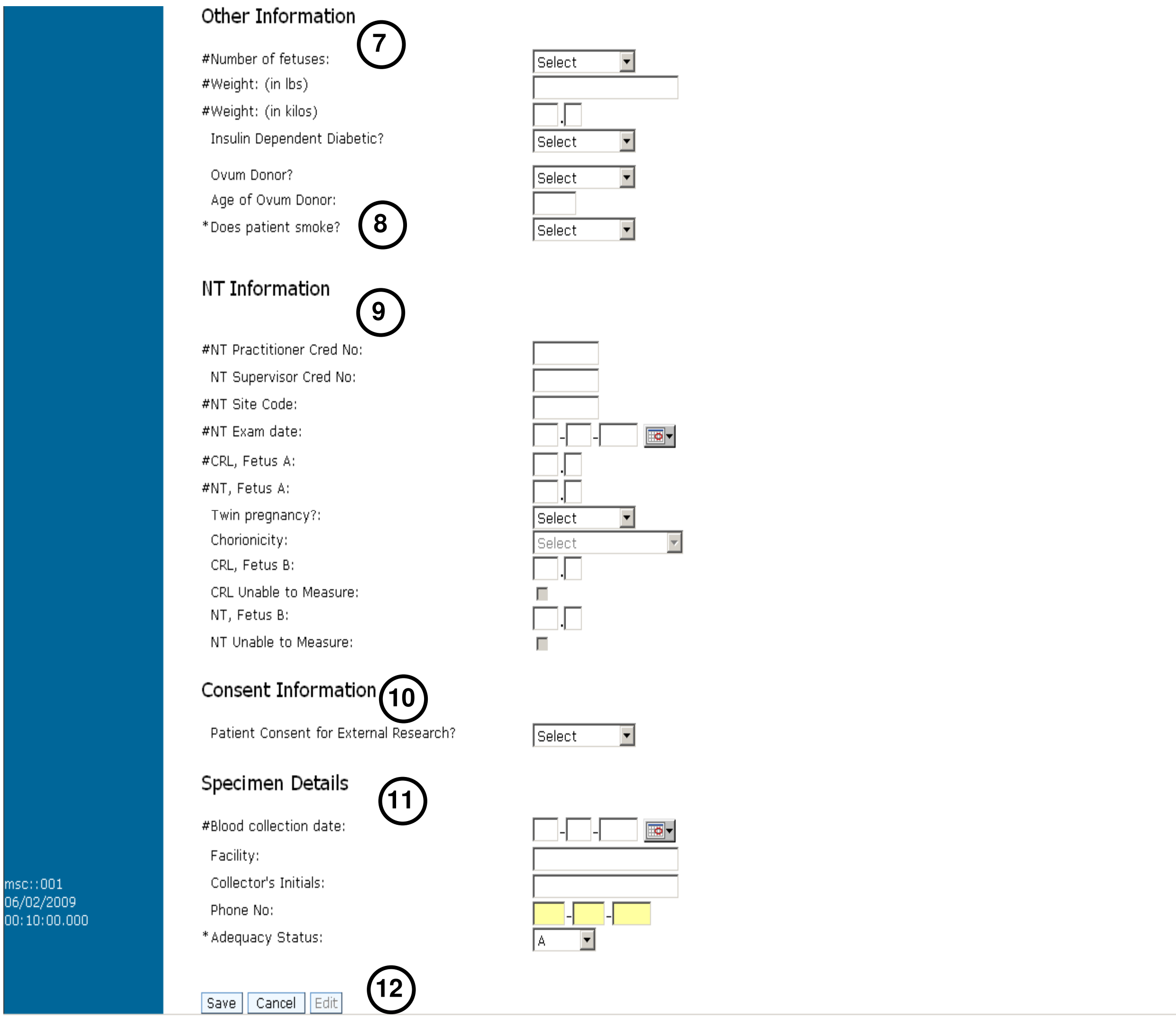
6. **Pregnancy Dating:**

   a. **<u>Ultrasound</u>** – Date Performed and Gestational Age on that date are double-entry fields.

   b. **<u>LMP</u>** – First day of the last menstrual period is a double-entry field.

   c. **<u>Physical Exam</u>** – Date of most recent exam is a double-entry field.

FIGURE 3



7. **Other Information:**

   a. **Number of fetuses in this pregnancy** is a double-entry field.

   b. **Patient's most recent weight** is a double-entry field.

TRF Data Entry (PNS) - (continued)

8. **Smoking information is mandatory.**

   a. Select “Yes”, “No”, or “Not Provided” in the dropdown for the field **Does the patient currently smoke cigarettes?**

9. **NT Information:**

   a. **NT Practitioner Cred No** is a double-entry field.

   b. **NT Site Code** is a double-entry field.

   c. **NT Exam date** is a double-entry field.

   d. **CRL, Fetus A** is a double-entry field.

   e. **NT, Fetus A** is a double-entry field.

   f. **Twin pregnancy** is a drop down control and if you select “Yes” then **Chorionicity** and **Fetus details** will be enabled.

10. **Consent Information:** Select **Patient Consent for External Research?**

    You can select “Yes”, “No”, or “Not Provided” in the dropdown.

11. **Specimen Details:**

    a. **Blood specimen collected on** is a double-entry field.

    b. **Adequacy Status** is a required field.

12. **Buttons:**

    a. **Save:** Initial save button click will enable the double entry fields and if any warning messages then it will be displayed on the corresponding control. TRF data is stored after the re-entry of double-entry fields.

    b. **Cancel:** Clears all TRF data entry fields.

    c. **Edit:** Allows editing of data after initial save, as long as you remain on this screen. Once you navigate away from the screen, or begin entering data for another TRF, you will no longer be able to access and edit previous records.

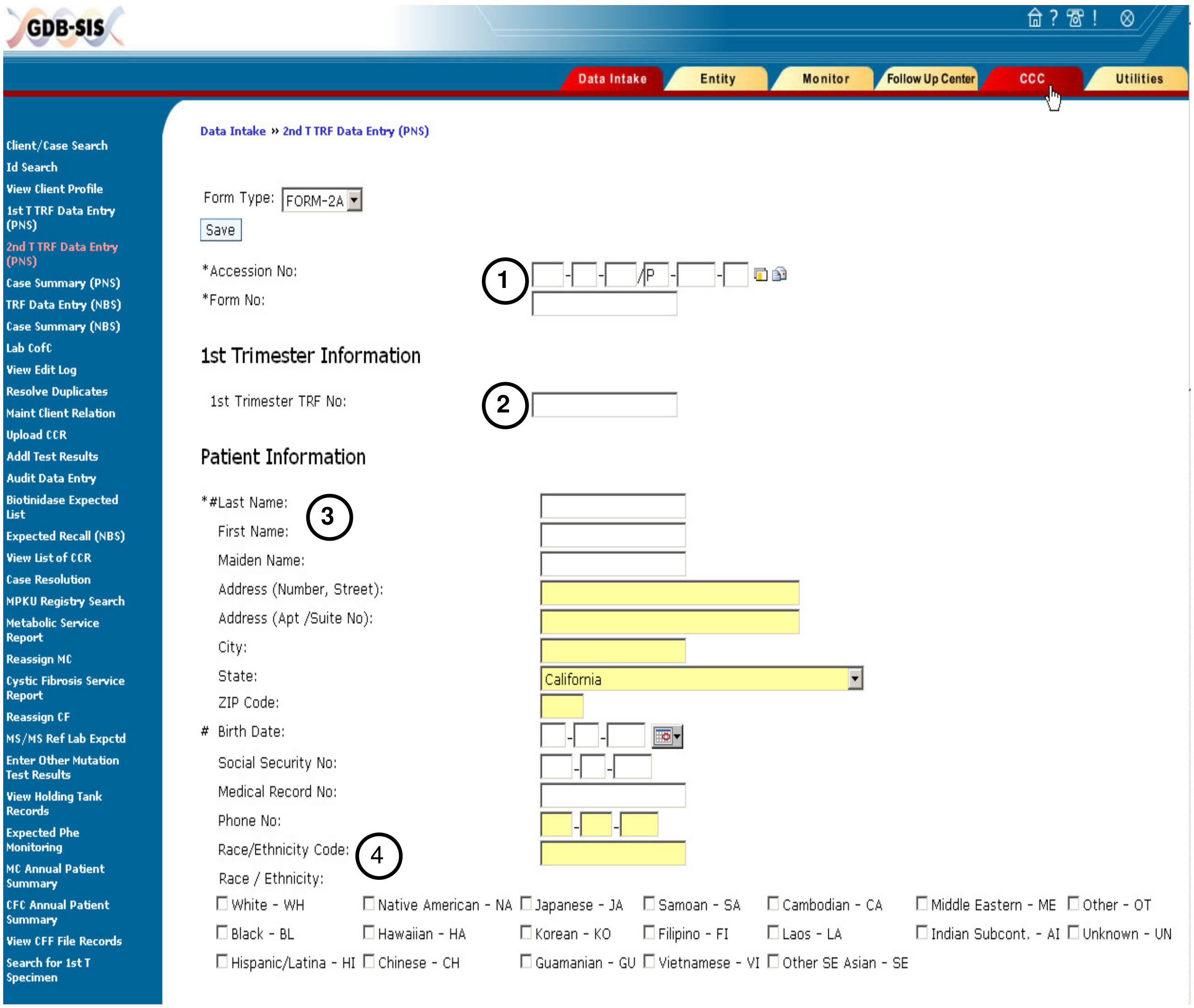
    Note: To access previously entered TRFs, use the Audit Data Entry screen to make changes to saved data.

2nd TRF Data Entry (PNS)

Data Intake >> TRF Data Entry (PNS)

This screen is used to enter 2nd Trimester TRF data for prenatal screening tests. Required fields are indicated by the preceding asterisk (*). For key fields, SIS will require you to enter the same information twice. These double-entry fields are indicated with a preceding pound sign (#). While these fields are not required to save a TRF in SIS, if you enter data in these fields, you will be required to re-enter the information and save again to permanently save the data.

FIGURE 1



1. **Accession Number** and **Form Number** are required fields.
2. **1st T Form Number** is an optional field.
3. **Patient Information:**

   a. **Last Name** is a required field.

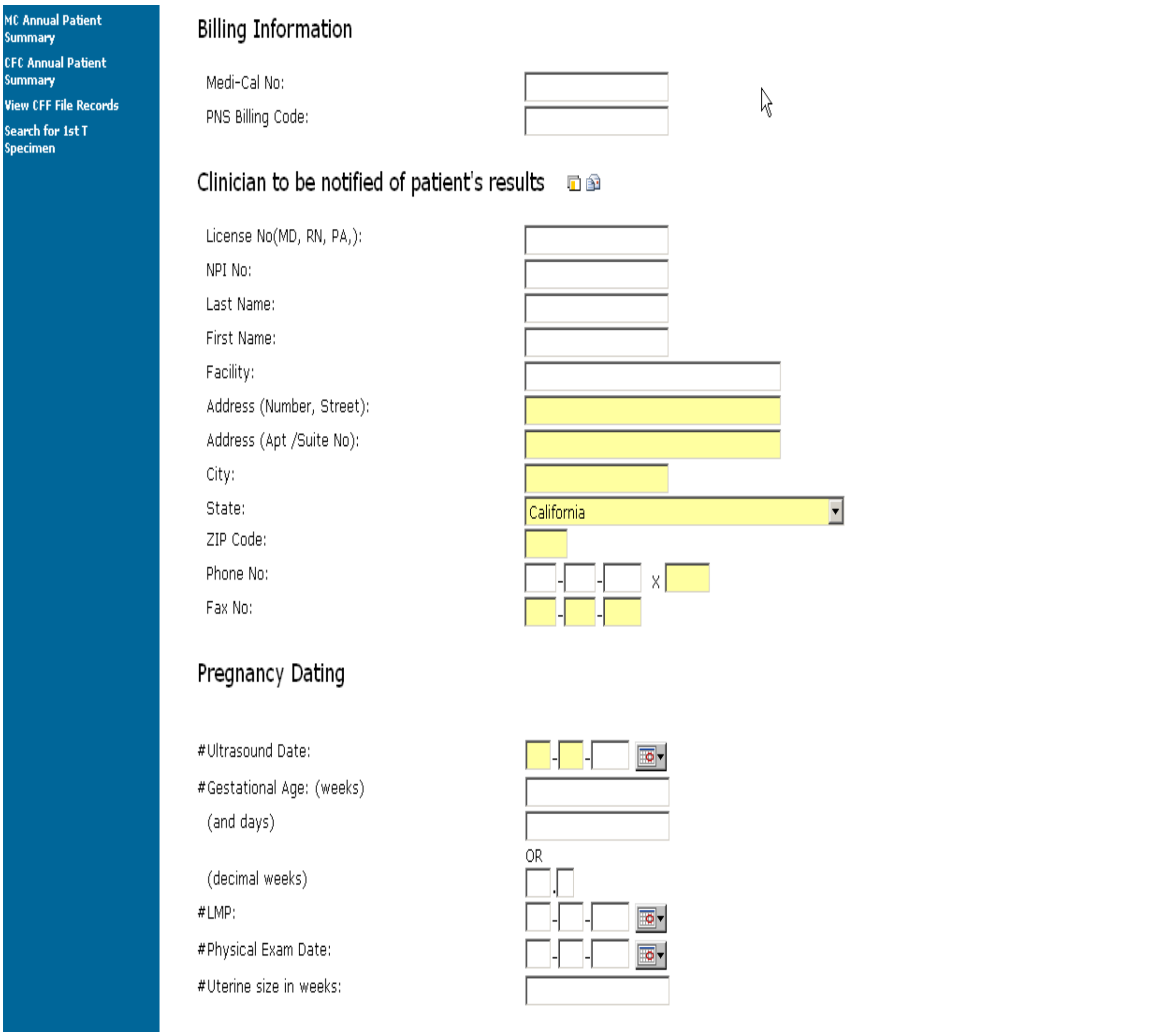
   b. **Birth Date** is a double-entry field.

2nd TRF Data Entry (PNS) (continued)

4. **Race/Ethnicity** Code and check boxes:

   a. Code is entry field and you can enter the race/ethnicities by code (two characters) in the comma delimited format with no space. The entered values will be selected in the checkbox.

   b. Multiple checks are allowed. You must uncheck a box to de-select it or remove the code from entry field.



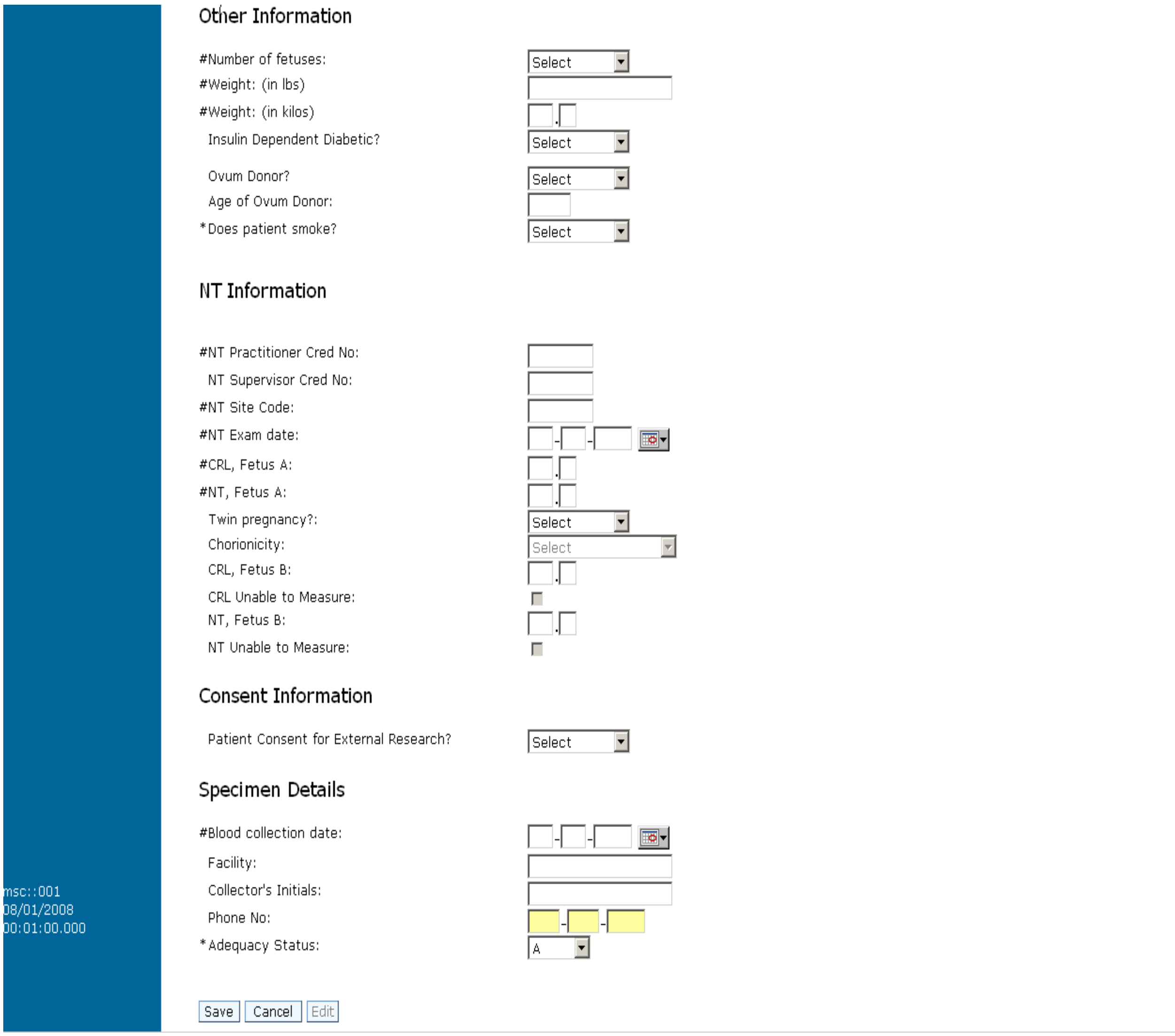
5. **Billing Information:** Enter billing information and billing code.
6. **Clinician to be notified of patient's results**: Fill in all areas.
7. **Pregnancy Dating:**

2nd TRF Data Entry (PNS)

a. **Ultrasound** – Date Performed and Gestational Age on that date are double-entry fields.

b. **LMP** – First day of the last menstrual period is a double-entry field.

c. **Physical Exam** – Date of most recent exam is a double-entry field.



8. **Other Information:**

   a. **Number of fetuses in this pregnancy** is a double-entry field.

   b. **Patient's most recent weight** is a double-entry field.

9. **Smoking information is mandatory.**

   b. Select “Yes”, “No”, or “Not Provided” in the dropdown for the field **does the patient currently smoke cigarettes?**

2nd TRF Data Entry (PNS) (continued)

10. **NT Information:**

    a. **NT Practitioner Cred No** is a double-entry field.

    b. **NT Site Code** is a double-entry field.

    c. **NT Exam date** is a double-entry field.

    d. **CRL, Fetus A** is a double-entry field.

    e. **NT, Fetus A** is a double-entry field.

    f. **Twin pregnancy** is a drop down control and if you select “Yes” then **Chorionicity** and **Fetus details** will be enabled.

11. **Consent Information:** Select **Patient Consent for External Research?**

    You can select “Yes”, “No”, or “Not Provided” in the dropdown.

12. **Specimen Details:**

    a. **Blood specimen collected on** is a double-entry field.

    b. **Adequacy Status** is a required field.

13. **Buttons:**

    a. **Save:** Initial save button click will enable the double entry fields and any warning messages will be displayed on the corresponding control. TRF data is stored after the re-entry of double-entry fields.

    b. **Cancel:** Clears all TRF data entry fields.

    c. **Edit:** Allows editing of data after initial save, as long as you remain on this screen. Once you navigate away from the screen, or begin entering data for another TRF, you will no longer be able to access and edit previous records.

Note: To access previously entered TRFs, use the Audit Data Entry screen to make changes to saved data.

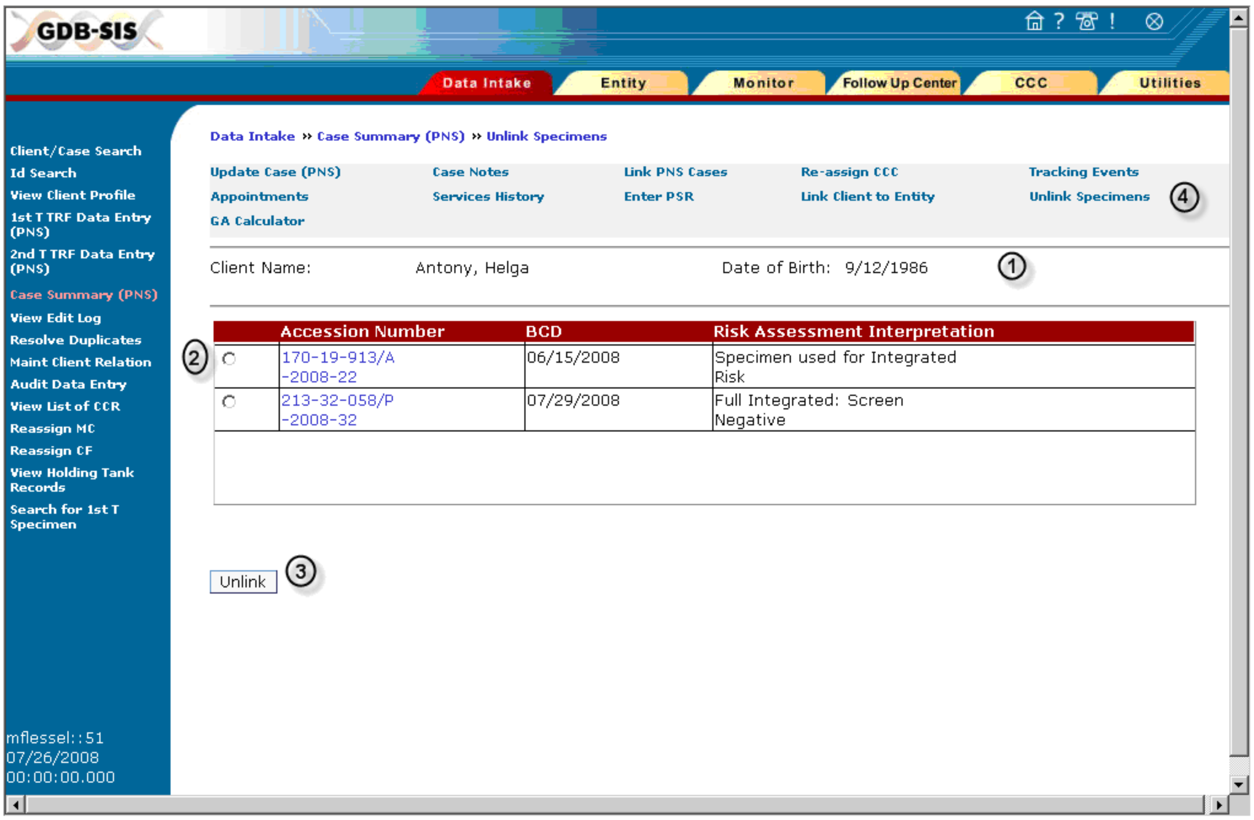
Unlink Specimens

Data Intake >> Case Summary (PNS) >> Unlink Specimens

This screen displays a history of all accession numbers related to a client for Pre PEII,NBS and displays a history of all accession numbers related to case for Post PEII. From this screen, you can unlink an accession number from a client. You will then be able to search for a different client with whom to link to the Accession Number.

This screen was named as ‘Specimen History’ before (Pre PEII) and now (Post PEII) it will be named as ‘Unlink Specimens’.

In both cases the **Unlink Specimens** screen will be displayed for the current client (not the selected or new client).



1. Client Information.
2. Specimen History data. For NBS and Pre PEII ‘Linked Accession’ column will be displayed in the specimen history grid. For PNS, the grid row will be ordered by accession number. For NBS the order is by collection date.
3. Click the radio button next to a Specimen History grid entry and click the Unlink button to unlink the Accession Number from the client.
    a. Clicking the Unlink button again will redirect you to the Client/Case Search screen to search for a client with whom the Accession Number can be linked. Click the Save button on the Client/Case Search screen to link the accession to the new client.

Unlink Specimens (continued)

b. If you cannot find a client with whom to link the Accession Number, you may create a new client by clicking the ‘New’ button on the Client/Case Search screen. You will be redirected to the Create/Update Client Profile screen to add a new user.

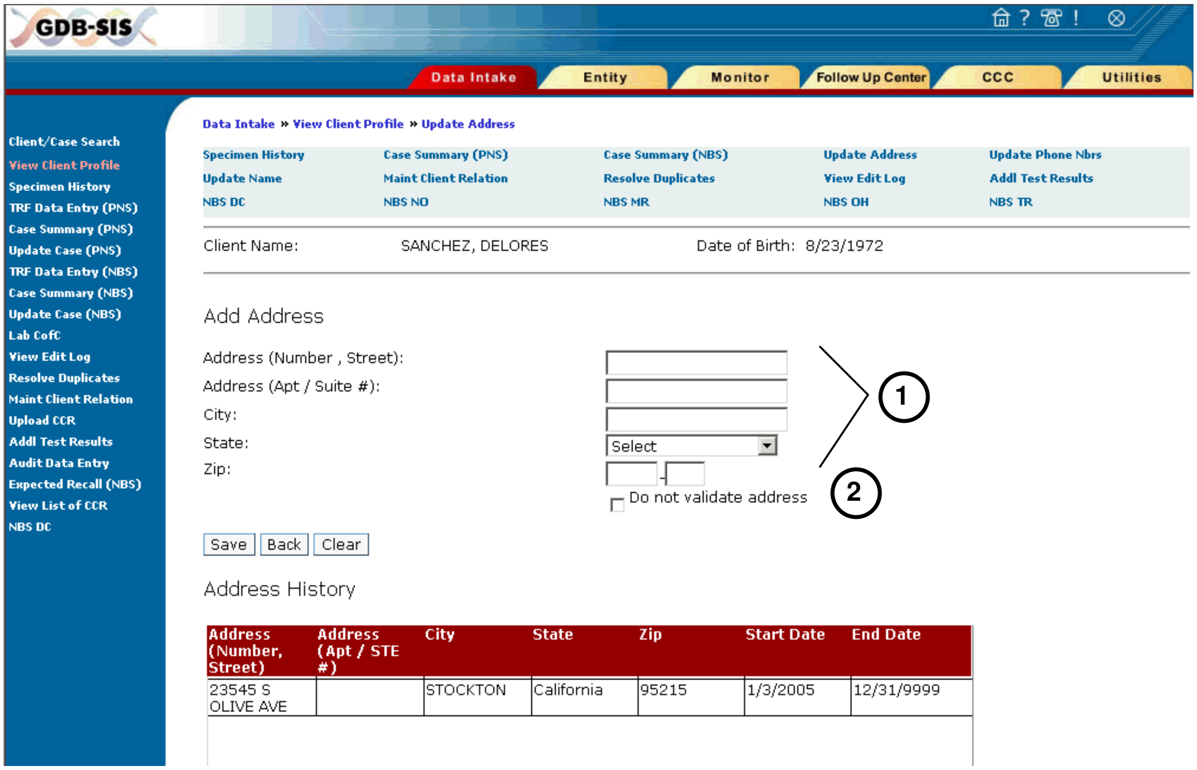
4. Unlink Specimens link will display as third level menu because now it loads information for a case.

Update Address

Data Intake >> View Client Profile >> Update Address

This screen allows a user to view address history and add a new address to a client's profile. Existing addresses cannot be updated, in order to retain address history. The most recent address added to SIS will be considered the client's current address.

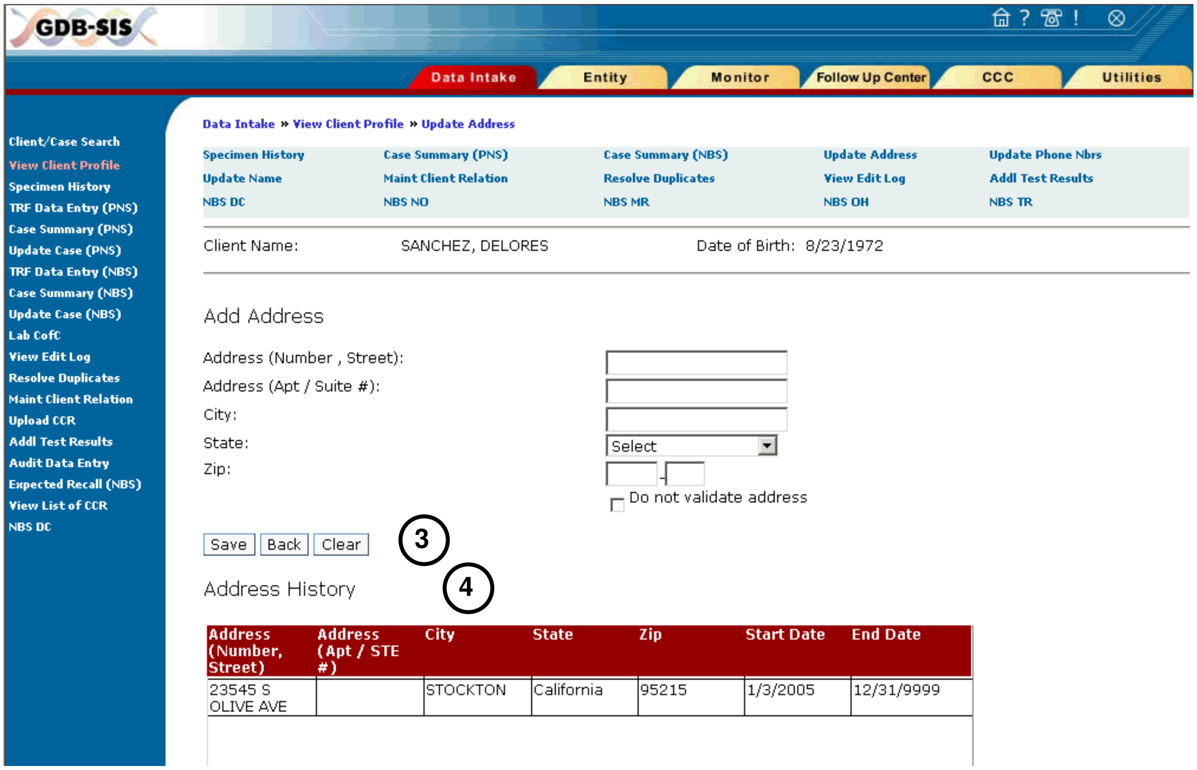
FIGURE 1



1. Enter the client's Address information in the **Add Address** fields. SIS will validate any address entered using address validation software.
    a. Address Information: SIS will automatically attempt to validate addresses entered. If possible, SIS will update the address information to a recognized address. For example, if you've entered 1234 Oak Dr., and the address validation program recognizes only a 1234 Oak St., it will automatically update the address information. If you elect to use the address validation feature, you should verify any corrections SIS makes to the address you have entered. In case of invalid address entry (which can not be corrected by Address Validation software), SIS will not store those details and will display an error message. You can correct details and click save again.
2. **Do not validate address** – Checking the box will deactivate the address validation feature.

Update Address (continued)

FIGURE 2



3. **Buttons**:
    a. **Save** – saves the record and add a new address record to the Address History grid.
    b. **Back** – return to the previous screen without saving.
    c. **Clear** – clears the Add Address fields without saving data.
4. The Previous addresses are displayed in the **Address History** grid, along with their Start Date and End Date. The start date will be automatically populated with the date the new address is added to SIS.
    a. SIS will automatically populate the End Date for a newly added address with 12/31/9999. When you replace an existing address with a new one, the End Date for the old address will be populated with the date the new address is added to SIS.

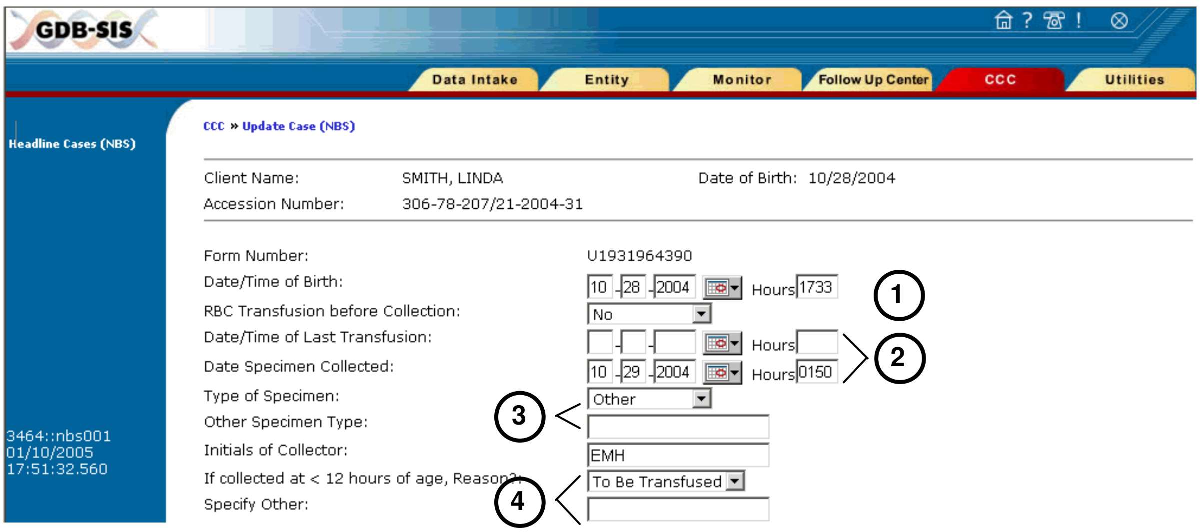
Update Case (NBS)

CCC >> Update Case (NBS)

The **Update Case (NBS)** screen allows you to make changes to the information that was originally entered on the Test Request Form. A variety of NBS case data can be updated here, including the transfusion date, specimen collection date, nursery and feeding types, birth weight, and family native language. The specimen's adequacy code and comments relating to the case can also be updated on this screen.

Please note that when updating information from the Client Profile screen, the information will NOT be reflected on the Case Summary (NBS) screen. This is to prevent old case information (i.e. for a previous pregnancy) from being updated. However, if information is updated on the Update Case (NBS) screen, it will be saved to the Client Profile screen.

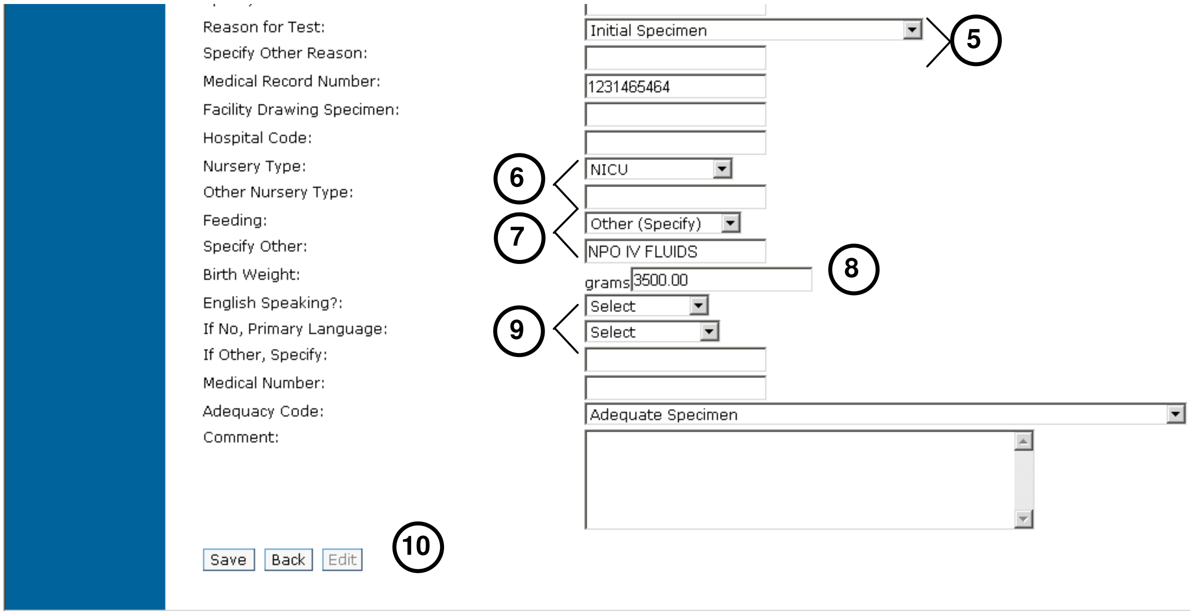
FIGURE 1



1. Enter the date and time the baby was born in the **Date/Time of Birth** field. Note that the Hours field is based on a 24-hour military clock.
2. Enter the date and time of the last transfusion if necessary in the **Date/Time of Last Transfusion** field. Note that the Hours field is in 24-hour format. Enter the date and time the specimen was collected in the **Date Specimen Collected** field. Note that the **Hours** field is in 24-hour format.
3. Select the specimen type (or Not Provided or Other Specimen Type) from the **Type of Specimen** dropdown field. If the required specimen type is not listed in the Type of Specimen dropdown field enter a value in the **Other Specimen Type** field.
4. Select the appropriate reason if required in the **If collected at < 12 hours of age, Reason?** field. If the required value is not listed in the dropdown field enter a value in the **Specify Other** field.

Update Case (NBS) - (continued)

FIGURE 2



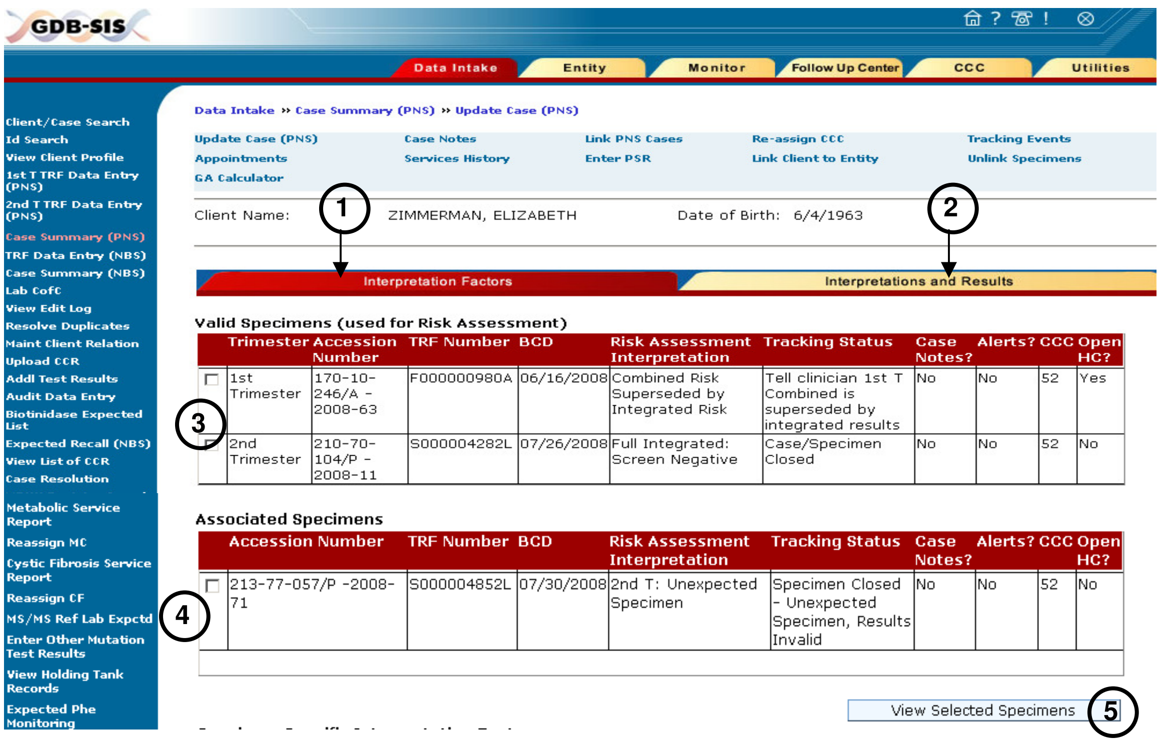
5. Select the reason for the test in the **Reason for Test** dropdown field. If the required value is not listed in the dropdown field enter a value in the **Specify Other Reason** field.
6. Select the nursery type from the **Nursery Type** dropdown field. If the required value is not listed in the dropdown field enter a value in the **Other Nursery Type** field.
7. Select the feeding method from the **Feeding** dropdown field. If the required value is not listed in the dropdown field enter a value in the **Specify Other** field.
8. Enter the birth weight in grams in the **Birth Weight** field.
9. Select Yes or No in the **English Speaking?** dropdown field. Select a value for the primary language in the **If No, Primary Language** field if the family does not speak English. If the family's primary language is not listed in the dropdown, enter the primary language in the **If Other, Specify** field.
10. **Buttons:**
    a. **Save** – Saves changes to the record.
    b. **Back** – Returns to the case summary (NBS) screen.
    c. **Edit** – After clicking Save, validations are performed and some fields will be displayed as read-only. You may change fields that are not grayed out or click the **Edit** button to edit other fields as well. Click the save button again to save the data.

Update Case (PNS)

Data Intake >> Case Summary (PNS) >>Update Case (PNS)

The new PEII Update Case screen is divided in to two tabs i.e. “Interpretation Factors” and “Interpretation and Results”. Navigation between these two tabs will retain the data. Screen will be loaded with master data and NT information by default with ISI messages related to the case. User can select max 3 specimens from Valid and Associated grid to edit specimen specific interpretation factors. Original TRF data columns are populated according to the selected specimens from Valid and Associated grid. Information received from multiple TRFs can be viewed and corresponding master or specimen specific factors can be updated. Case notes can be added by clicking case notes hyper link “Yes/No” in valid and associated grid.

FIGURE 1



Screen is divided into two tabs, 1 and 2 (Figure 1) are the tab links with which user can navigate each of them.

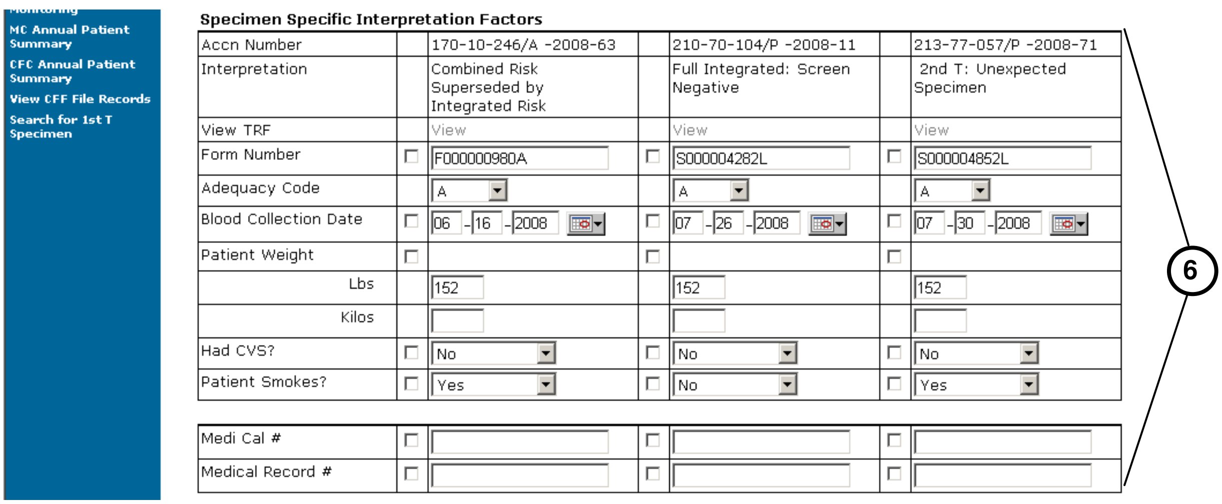
1. **Interpretation Factors tab** will display all interpretation factors for selected specimens, master data, and NT information along with original TRF data.
2. **Interpretation and Results tab** will display gestational age changes, old and new interpretation and risks, old and new MoM details and old and new adjusted MoM details after reinterpretation. Also has provision to enter case notes and associate it to one or more specimens in the case
3. **Valid Specimens (Used for Risk Assessment)** section will display valid specimen in a case which are used for risk assessment with trimester, accession number, TRF form number, blood collection date, interpretation, tracking status, case notes, alerts, headline case and assigned CCC details.

Update Case (PNS) - (continued)

4. **Associated Specimens** section will display associated specimen details with trimester, accession number, TRF form number, blood collection date, interpretation, tracking status, case notes, alerts, headline case and assigned CCC details.

5. **View Selected Specimen** button click will populate interpretation factors and original TRF data for selected specimens from valid (3) and associated (4) grid.

FIGURE 2



Specimen Specific Interpretation Factors

Accn Number		170-10-246/A -2008-63		210-70-104/P -2008-11		213-77-057/P -2008-71
Interpretation		Combined Risk Superseded by Integrated Risk		Full Integrated: Screen Negative		2nd T: Unexpected Specimen
View TRF		View		View		View
Form Number	☐	F000000980A	☐	S000004282L	☐	S000004852L
Adequacy Code		A		A		A
Blood Collection Date	☐	06 - 16 - 2008	☐	07 - 26 - 2008	☐	07 - 30 - 2008
Patient Weight	☐		☐		☐	
Lbs		152		152		152
Kilos						
Had CVS?	☐	No	☐	No	☐	No
Patient Smokes?	☐	Yes	☐	No	☐	Yes
Medi Cal #	☐		☐		☐	
Medical Record #	☐		☐		☐	

6. **Specimen Specific Interpretation factors** data can be confirmed and updated here. These sections are populated on view selected specimen button (5) click according to the selected specimens.

Update Case (PNS) - (continued)

FIGURE 3

7

8

Case-wide Interpretation Factors

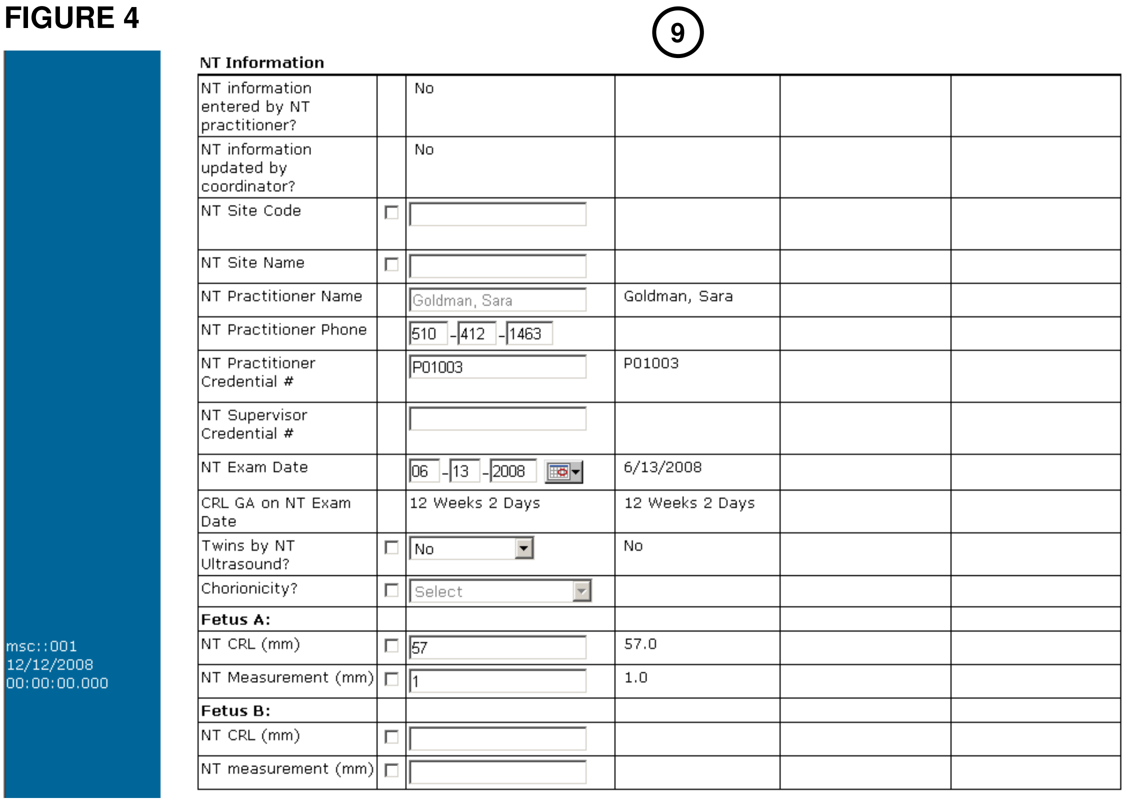
Master Data		Master Data	Original TRF Data	Original TRF Data	Original TRF Data
Accn Number			170-10-246/A - 2008-63	210-70-104/P -2008-11	213-77-057/P - 2008-71
Date of Birth	☐	06 - 04 - 1963	6/4/1963	6/4/1963	6/4/1963
Age at Term		45.56 Years			
Ovum Donor?	☐	Select			
Ovum Donor Age at Donation	☐				
Race/Ethnicity	☐				
Race1		Black	Black	Black	Black
Race2		Other Southeast Asian	Other Southeast Asian	Other Southeast Asian	Other Southeast Asian
Race3		Select			
Race4		Select			
Insulin Dependent Diabetic	☐	No	No	No	No
Dating Method Selected	☐	NT CRL	**NT CRL**	**Physical Exam**	**NT CRL**
GA at collection by NT CRL			12 Weeks 5 Days	18 Weeks 3 Days	19 Weeks 0 Day
PDC U/S Date	☐	- -			
PDC U/S GA	☐				
Weeks					
Days					
Decimal					
PDC U/S GA at collection					
U/S Date	☐	- -			
U/S GA	☐				
Weeks					
Days					
Decimal					
U/S GA at collection					
LMP Date	☐	- -			
LMP GA at collection					
Physical Exam Date	☐	07 - 17 - 2008		7/17/2008	
PE GA Weeks	☐	14		14	
PE GA at collection			9 Weeks 4 Days	15 Weeks 2 Days	15 Weeks 6 Days
Number of Fetuses	☐	1	1	1	1
Fetal Reduction?	☐	Select			
Fetal Demise > 8 weeks?	☐	Select			
SSN			620-80-0503	620-80-0503	620-80-0503
Alternate DOB		- -			

Update Case (PNS) - (continued)

7. **Master Data or Case Wide Interpretation Factors** can be confirmed and updated here. Master data includes race and ethnicity, GA details, selected dating method, fetus details and ovum donor details etc.

8. **Original TRF data** section will display original TRF information is collected at the time of TRF entry. This data will not be updated even if the corresponding master data field is modified.

FIGURE 4



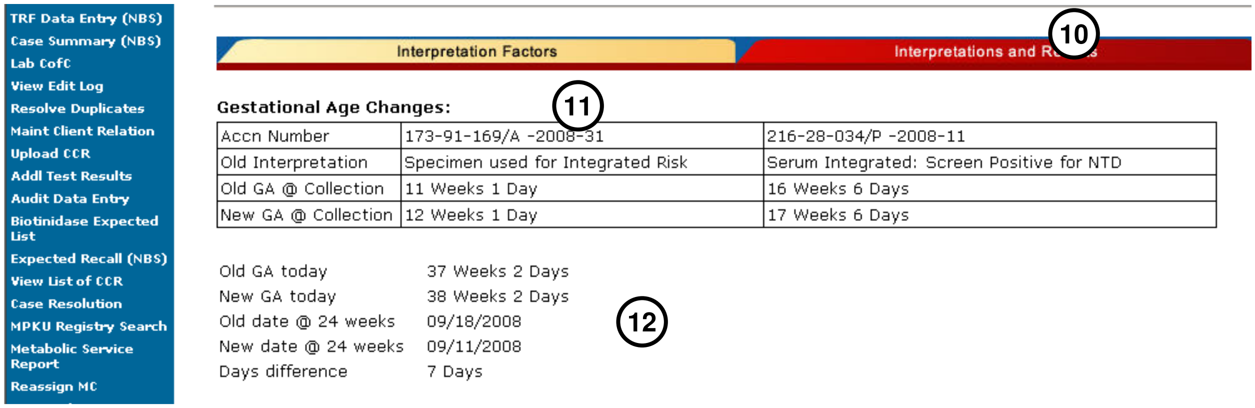
NT Information

NT information entered by NT practitioner?		No			
NT information updated by coordinator?		No			
NT Site Code	☐				
NT Site Name	☐				
NT Practitioner Name		Goldman, Sara	Goldman, Sara		
NT Practitioner Phone		510 - 412 - 1463			
NT Practitioner Credential #		P01003	P01003		
NT Supervisor Credential #					
NT Exam Date		06 - 13 - 2008	6/13/2008		
CRL GA on NT Exam Date		12 Weeks 2 Days	12 Weeks 2 Days		
Twins by NT Ultrasound?	☐	No	No		
Chorionicity?	☐	Select			
Fetus A:					
NT CRL (mm)	☐	57	57.0		
NT Measurement (mm)	☐	1	1.0		
Fetus B:					
NT CRL (mm)	☐				
NT measurement (mm)	☐				

9. **NT Information** section displays the master NT details as well as original NT information came on TRF for the selected specimens. Master NT information can be confirmed and updated here. Though it is titled as master NT information, the display depends on what NT information the case has. If master NT information is entered by NT practitioner then CCC confirmation check boxes are pre populated.

Update Case (PNS) - (continued)

FIGURE 5



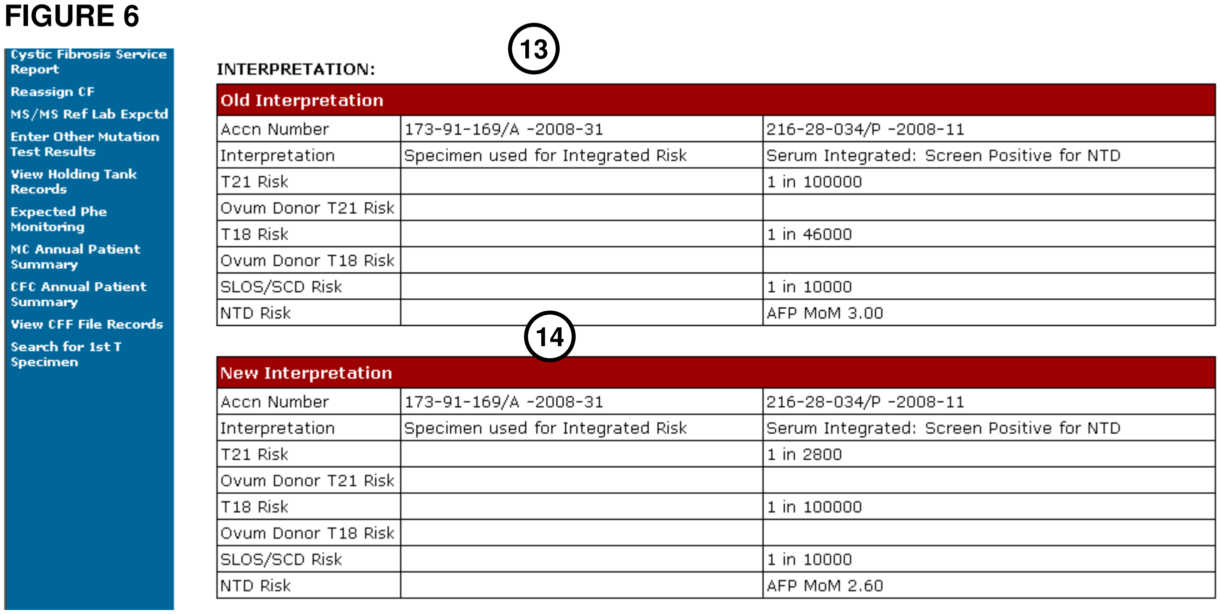
Gestational Age Changes:

Accn Number	173-91-169/A -2008-31	216-28-034/P -2008-11
Old Interpretation	Specimen used for Integrated Risk	Serum Integrated: Screen Positive for NTD
Old GA @ Collection	11 Weeks 1 Day	16 Weeks 6 Days
New GA @ Collection	12 Weeks 1 Day	17 Weeks 6 Days

Old GA today	37 Weeks 2 Days
New GA today	38 Weeks 2 Days
Old date @ 24 weeks	09/18/2008
New date @ 24 weeks	09/11/2008
Days difference	7 Days

10. The **Interpretation and Results** tab displays the old and new interpretation & results before and after changes have been made. This tab displays information for all the specimens irrespective of the specimens selected on the first tab.
11. Old and new gestational age changes are displayed for all the specimens.
12. Old and new gestational age today, 24 weeks and day's difference for the pregnancy as a whole are displayed.

FIGURE 6



INTERPRETATION:

Old Interpretation		
Accn Number	173-91-169/A -2008-31	216-28-034/P -2008-11
Interpretation	Specimen used for Integrated Risk	Serum Integrated: Screen Positive for NTD
T21 Risk		1 in 100000
Ovum Donor T21 Risk		
T18 Risk		1 in 46000
Ovum Donor T18 Risk		
SLOS/SCD Risk		1 in 10000
NTD Risk		AFP MoM 3.00

New Interpretation		
Accn Number	173-91-169/A -2008-31	216-28-034/P -2008-11
Interpretation	Specimen used for Integrated Risk	Serum Integrated: Screen Positive for NTD
T21 Risk		1 in 2800
Ovum Donor T21 Risk		
T18 Risk		1 in 100000
Ovum Donor T18 Risk		
SLOS/SCD Risk		1 in 10000
NTD Risk		AFP MoM 2.60

13. Old interpretation and numeric risks for all specimens are displayed in this grid.
14. New interpretation and numeric risks for all specimens are displayed in this grid.

Update Case (PNS) - (continued)

FIGURE 7

TEST RESULT VALUES AND FINAL MoMs: 15

Analytic Values		
Accn Number	173-91-169/A -2008-31	216-28-034/P -2008-11
HCG1	72.76 IU/mL	72.76 IU/mL
PAPP-A	1.93 µU/mL	1.93 µU/mL
AFP		122.75 ng/mL
HCG		29.77 IU/mL
UE3		1.19 ng/mL
INH		720.31 pg/mL

15. Test result values as processed by the labs are displayed for all specimens in the case.

FIGURE 8

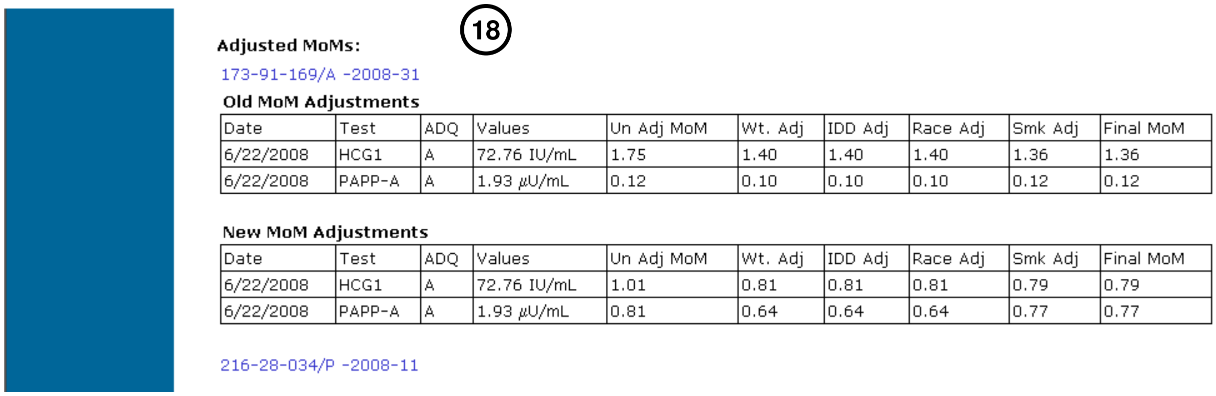
Old MoMs	16	
Accn Number	173-91-169/A -2008-31	216-28-034/P -2008-11
HCG1 MoM	1.36	1.36
PAPP-A MoM	0.12	0.12
AFP MoM		3.00
HCG MoM		1.81
UE3 MoM		0.84
INH MoM		2.76

New MoMs	17	
Accn Number	173-91-169/A -2008-31	216-28-034/P -2008-11
HCG1 MoM	0.79	0.79
PAPP-A MoM	0.77	0.77
AFP MoM		2.60
HCG MoM		2.09
UE3 MoM		0.66
INH MoM		2.79

16. Old final MoMs are displayed.
17. New final MoMs are displayed.

Update Case (PNS) - (continued)

FIGURE 9



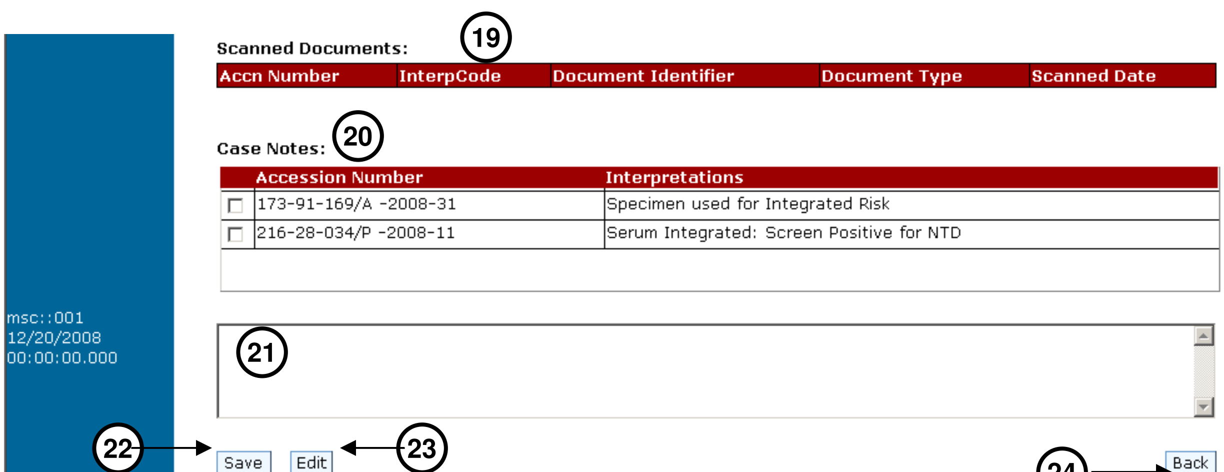
Date	Test	ADQ	Values	Un Adj MoM	Wt. Adj	IDD Adj	Race Adj	Smk Adj	Final MoM
6/22/2008	HCG1	A	72.76 IU/mL	1.75	1.40	1.40	1.40	1.36	1.36
6/22/2008	PAPP-A	A	1.93 µU/mL	0.12	0.10	0.10	0.10	0.12	0.12

New MoM Adjustments

Date	Test	ADQ	Values	Un Adj MoM	Wt. Adj	IDD Adj	Race Adj	Smk Adj	Final MoM
6/22/2008	HCG1	A	72.76 IU/mL	1.01	0.81	0.81	0.81	0.79	0.79
6/22/2008	PAPP-A	A	1.93 µU/mL	0.81	0.64	0.64	0.64	0.77	0.77

18. Old and new adjusted MoMs are displayed. Each accession number is a hyper link, by clicking this hyper link user can expand or collapse the adjusted MoMs table.

FIGURE 10



19. **Scanned documents** grid displays all the scanned documents related to the specimen with accession number, Interp Code, Document Identifier, Document Type and Scanned date details.

20. **Case Notes** grid displayed all the accession number and interpretation details as per old interpretation with select check box to add case notes.

21. **Case Notes Text Box** is an input field to add case notes to selected accession numbers in case notes grid.

22. **Save Button** click saves master data, NT information and all case information details after reinterpretation. This button is enabled only when user clicks on reinterpretation button on 1st tab.

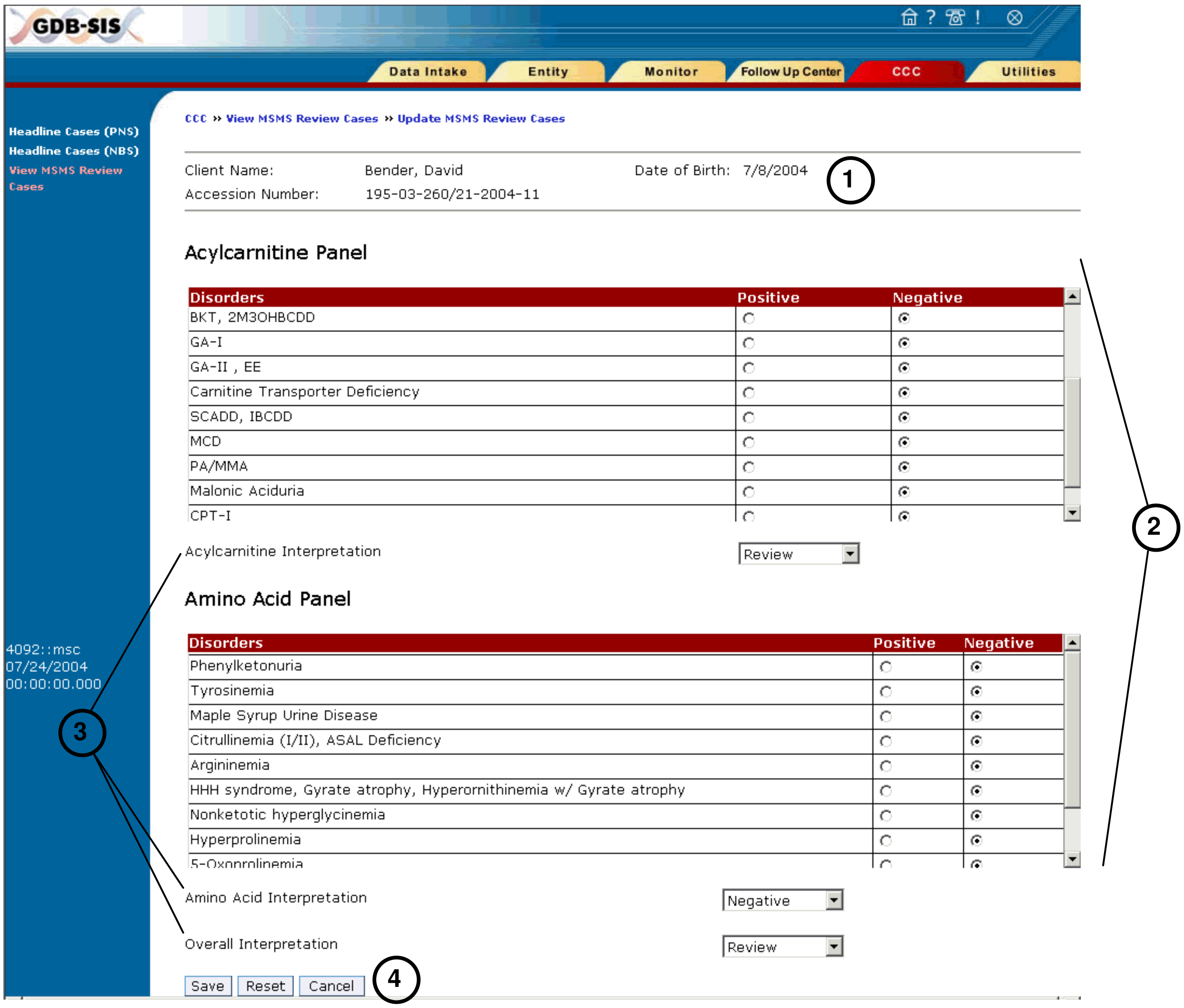
23. **Edit Button** click navigate user back to first tab and user can modify the data and reinterpret the case.

24. **Back Button** click will navigate user back to Case Summary screen.

Update MSMS Review Cases

CCC >> View MSMS Review Cases >> Update MSMS Review Cases

This screen displays all disorders associated with a specimen. The user can change the disorder flag for disease patterns using this screen. This screen is also used to change the overall interpretation for the case.



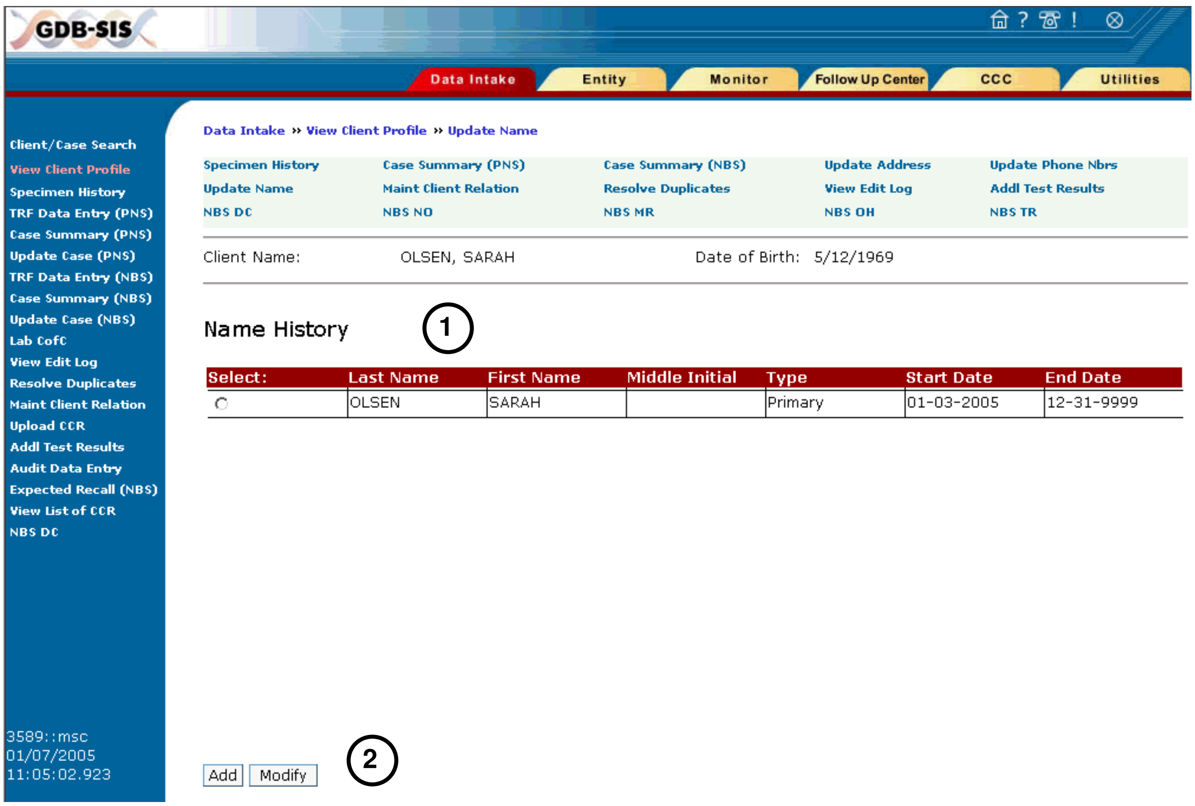
1. Client information is displayed at the top of the screen.
2. The **Acylcarnitine Panel** and the **Amino Acid Panel** display the disorder flags, which may be changed.
3. The **Interpretations** dropdown fields may also be used to change the overall case interpretation.
4. **Buttons:**
   a. **Save –** save the changes to the disorder flags.
   b. **Reset** – reset the flags to the previous values.
   c. **Cancel** – cancel changes and return to the previous screen.

Update Name

Data Intake >> View Client Profile >> Update Name

The **Update Name** screen allows you to view the name history of a client, with start and end dates for each name. This screen also provides the ability to add a new name to the history, or update an existing name. The client's most recent name will be considered the current name. This is the only screen in SIS where a client's alias (an alternative, secondary name for the client) can be entered.

FIGURE 1



1. A history of names assigned to a client in SIS is displayed in the **Name History** grid along with the **Type**, **Start Date** and **End Date.**

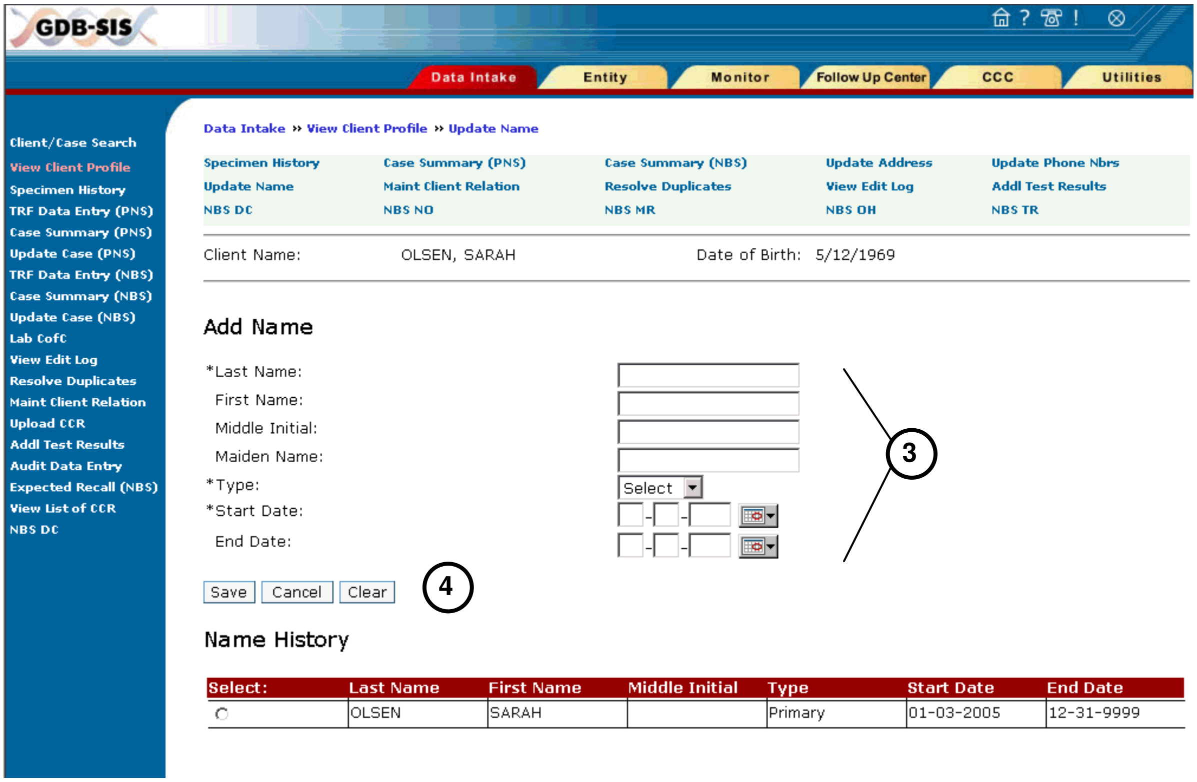
2. **Buttons:**

   a. **Add** – Allows you to create a new name record for the client. A new row will be added to the Name History grid. See **FIGURE 2** for additional details.

   b. **Modify** – Allows you to modify the selected record, using radio buttons, in the Name History grid. See **FIGURE 3** for additional details.

Update Name (continued)

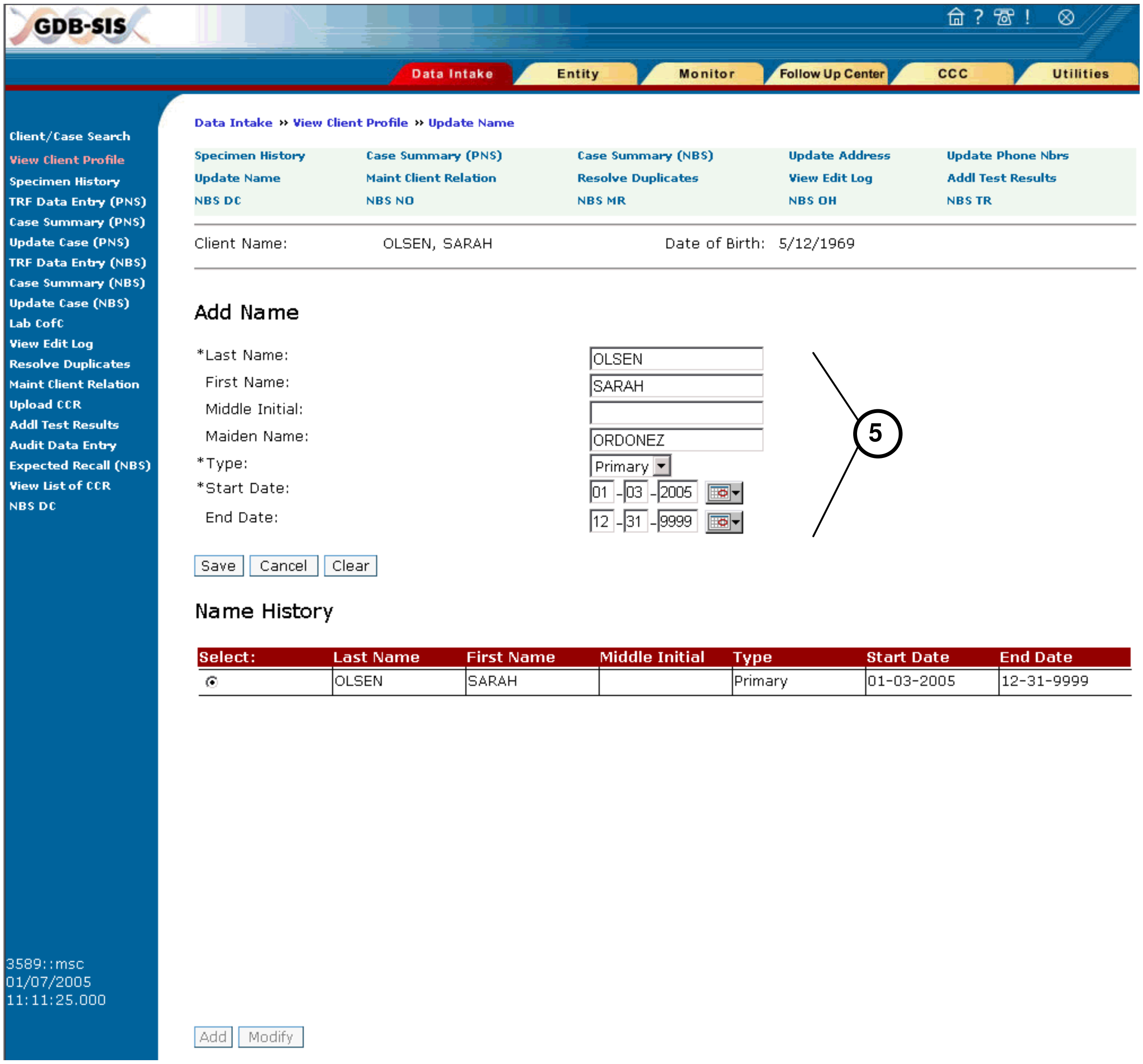
FIGURE 2



3. Enter the client's new name information in the **Add Name** fields. Last Name, Start Date and name Type (Primary or Alias) are required fields. The Start Date cannot be a future date. Even if you specify an End Date, the Primary name is end dated with the max date '12-31-9999' and a message stating the same appears after the name has been added.
   a. When a new name record is added, the End Date of the previous record will be automatically updated to reflect the date the new record is added.
   b. If the starting date of the new record begins on the same date of any date less than the previous Primary name then an error message for ' Overlapping dates' is displayed.
4. **Buttons:**
   a. **Save** – Saves the new name, creating a new row in the Name History grid.
   b. **Cancel** – Returns you to the previous state of the page, discarding any unsaved data.
   c. **Clear** – Resets the form fields to blank, discarding any unsaved data.

Update Name (continued)

FIGURE 3



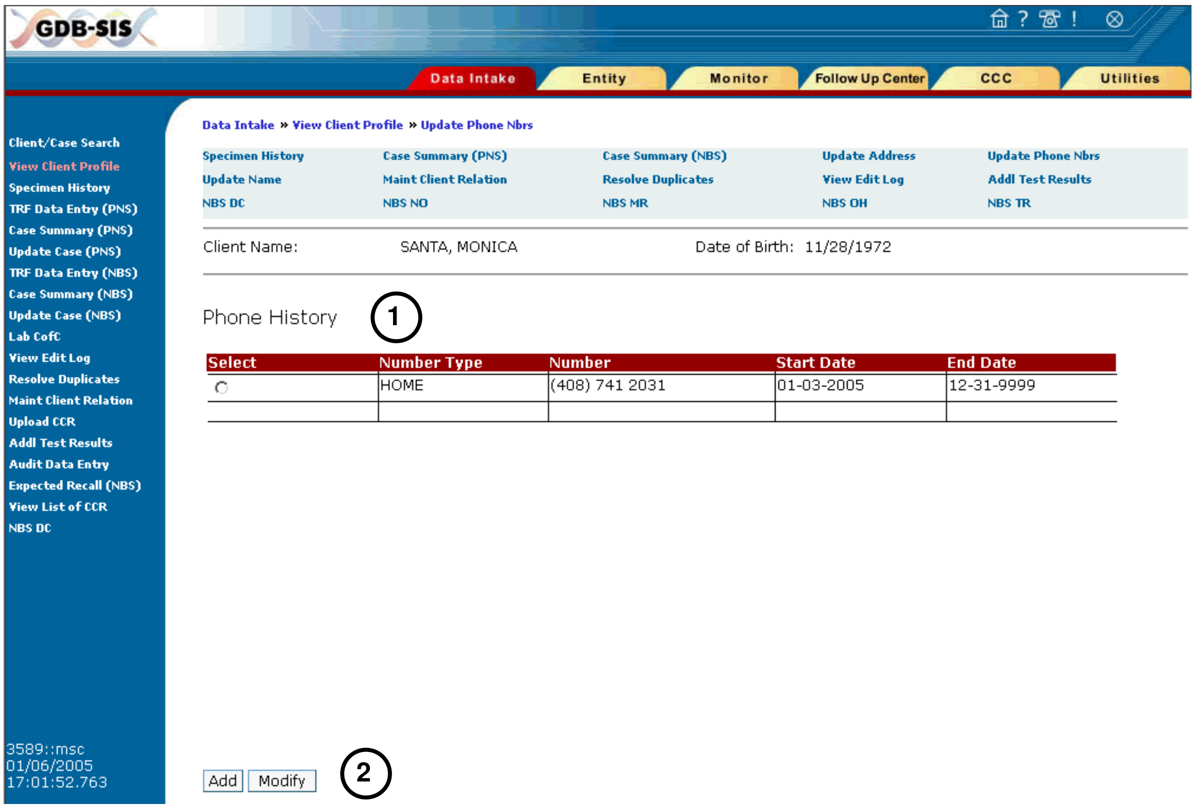
5. Modify the selected client name information in the **Add Name** fields. Last Name, Start Date and name Type (Primary or Alias) are required fields. The Start Date cannot be a future date. If you do not specify an End Date, the field will be auto populated with 12-31-9999.

Update Phone Numbers

Data Intake >> View Client Profile >> Update Phone Nbrs

The **Update Phone Nbrs** screen allows a user to view the phone number history of a client with start and end dates for each phone number. This screen also provides the ability to add a new phone number to the client profile, or update an existing phone number. The client's most recent phone number will be considered the current phone number.

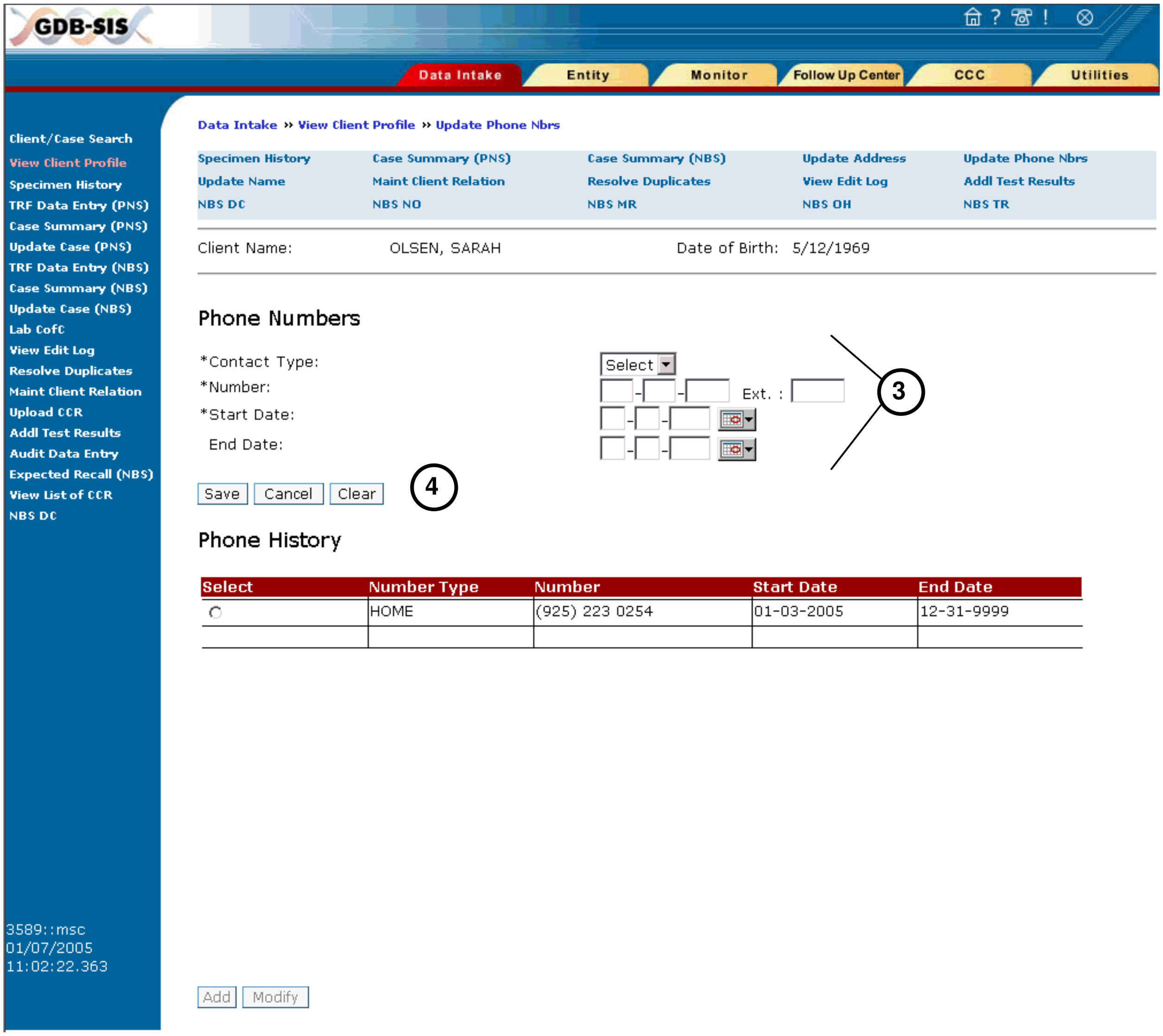
FIGURE 1



1. A history of phone numbers assigned to a client in SIS is displayed in the **Phone History** grid along with the Type, Start Date and End Date
2. **Buttons:**
   a. **Add** – Allows you to create a new phone number record for the client. A new row will be created in the Phone History grid. See **FIGURE 2** for additional details.
   b. **Modify** – Allows you to edit the selected existing phone record. Select the record using the radio button in the Select column of the Phone History grid. See **FIGURE 3** for additional details.

Update Phone Numbers (continued)

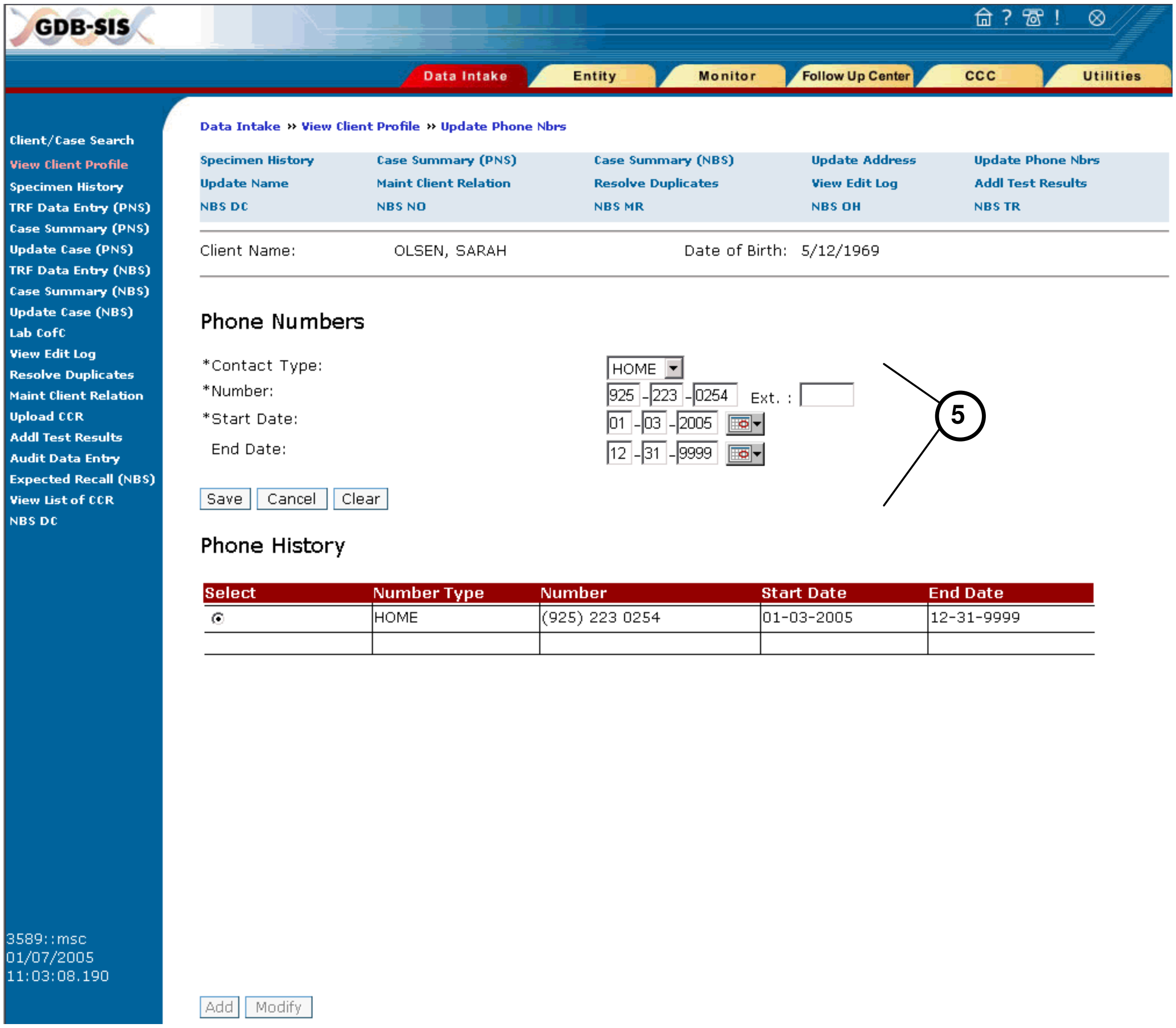
FIGURE 2



3. Enter the new client phone number information in the Phone Number fields. **Contact Type (**Home, Work, Cell, Fax, TTY), **Number** and **Start Date** are required fields. The **Start Date** cannot be a future date. If you do not specify an **End Date**, the field will be auto populated with 12-31-9999.
4. **Buttons:**
   a. **Save** – Saves the new phone number.
   b. **Cancel** – Returns you to the previous state of the page, discarding any unsaved data.
   c. **Clear** – Resets the form fields to blank, discarding any unsaved data.

Update Phone Numbers (continued)

FIGURE 3

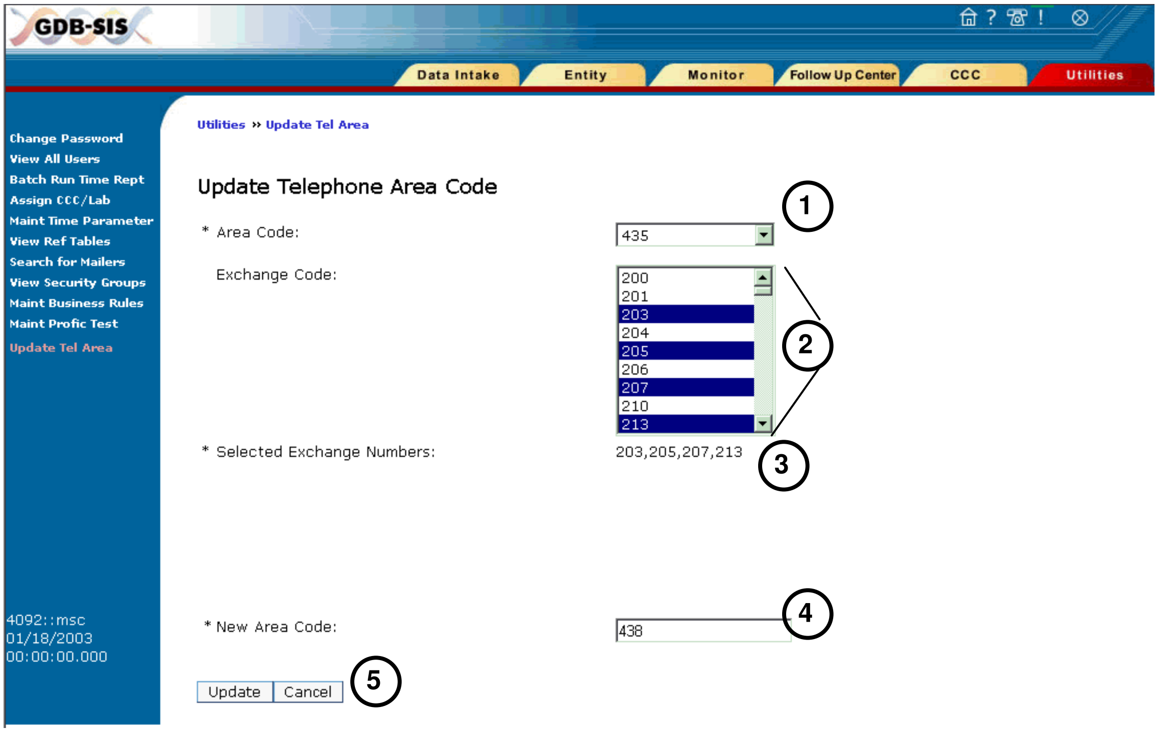


5. Modify the selected client phone number information in the **Phone Numbers** fields. Contact Type (Home, Work, Cell, Fax, TTY), Number and Start Date are required fields. If you do not specify an End Date, the field will be auto populated with 12-31-9999.

Update Telephone Area Code

Utilities >> Update Tel Area

This screen allows you to create new and update existing area codes and exchange codes.



1. **Area Code** dropdown is a required field. Selecting an area code will display the existing associated exchange codes (see #2).
2. Select one or more exchange codes from the Exchange Code list to update. These exchange codes will be associated with the New Area Code. Hold down the CTRL key to select more than one.
3. Exchange codes selected in the previous step are displayed in the **Selected Exchange Numbers** field.
4. Enter the new area code for the selected exchange codes in the **New Area Code** field.
5. **Buttons:**
   a. **Update** – will associate the selected exchange codes with the new area code, and reload a blank screen. The new area code will be added to the Area Code dropdown. In this example, the exchange codes 203, 205, 207, and 213, will now be associated with area code 438, and no longer with area code 435.
   b. **Cancel** – disregards any changes and reloads a blank screen.

Upload CCR (Confidential Case Report)

Data Intake >> Upload CCR

This screen allows you to upload a Confidential Case Report (CCR) file into SIS containing registry information from different sources.

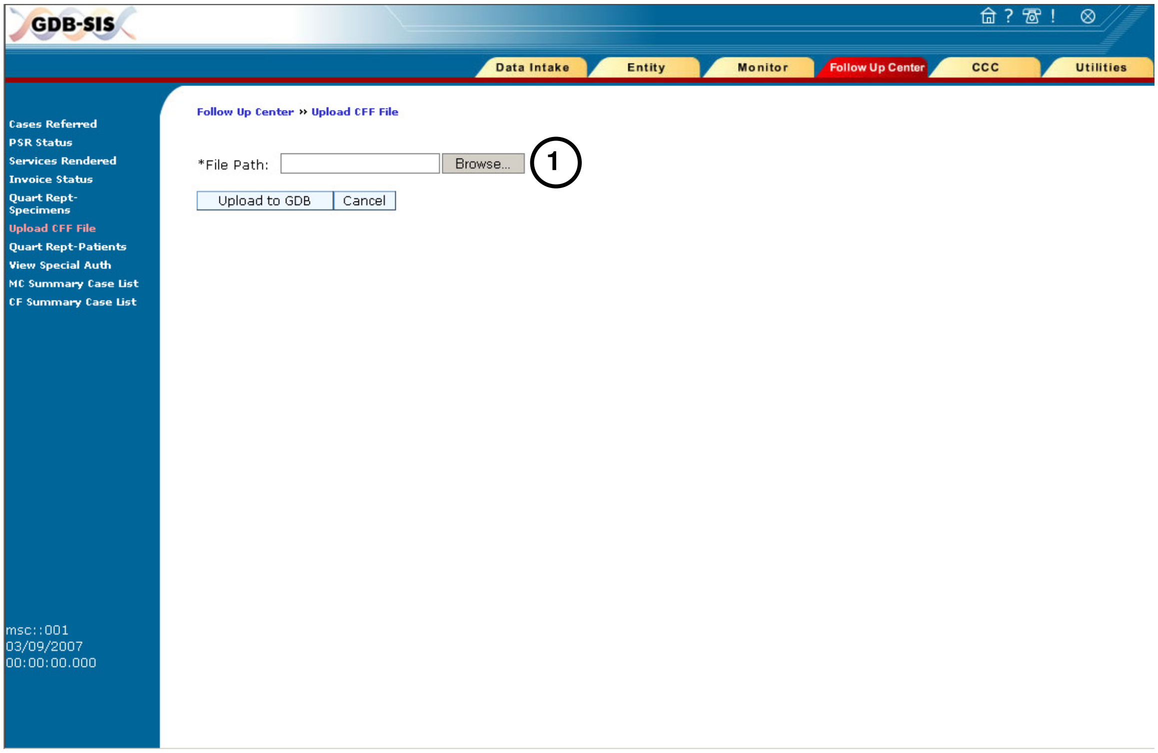
1. **Facility Type** is a required field. Select your facility type using the radio buttons.
2. **Required Fields:**
   a. **Name of Lab** is a required field. You can click the **Search** link, which directs you to the Search Entity screen in order to find the lab and select it <u>or</u> you can enter the Name of Lab directly.
   b. **Date of Upload** is a required field.
   c. **File Path** is a required field. When you click the **Browse** button, a "Choose File" popup window will be displayed, allowing you to find and select the file you want to upload, and will insert the filepath into the field.
3. **Buttons:**
   a. **Upload** button will send the file you have selected to the SIS server, where it will be processed by a batch program. You will receive a confirmation in SIS once the file is uploaded.
   b. **Clear** button clears the information from all fields and reloads the screen, discarding any unsaved data.

Upload CFF File

Follow Up Center >> Upload CFF File

This screen allows the user to upload electronic data received from the Cystic Fibrosis Foundation into SIS.

FIGURE 1



1. **Buttons**:
    a. **Browse:** Displays the **Choose File** window. Navigate to the file to be uploaded, click on the file and click the **Open** button to return the path of the file into the **File Path** field.
    b. **Upload to GDB:** Moves the file specified in the **File Path** to the batch server. Although the file has been uploaded to the batch server, the data in the file will not appear in SIS until the next day, as the file still needs to be run through the nightly batch processing in order for SIS to process the data in the file.

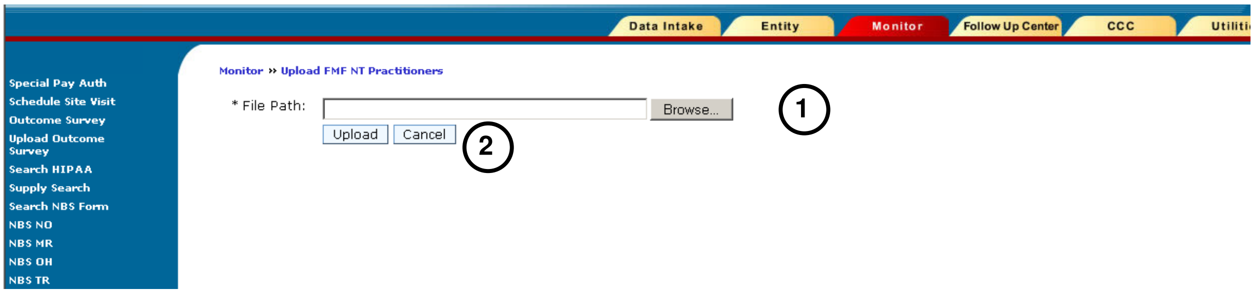
       Note: In order to be uploaded, the file must be in the data format specified in the *Specifications – CFF File Upload.doc* document.
    c. **Cancel:** Clears the screen without uploading the file.

Upload FMF NT Practitioners

Monitor » Upload FMF NT Practitioners

This screen allows GDSP to upload FMF NT practitioner data files into SIS in an electronic format. The file must be in the same data format as that specified in the Specifications – FMF Practitioner Data Workflow.doc document.

FIGURE 1



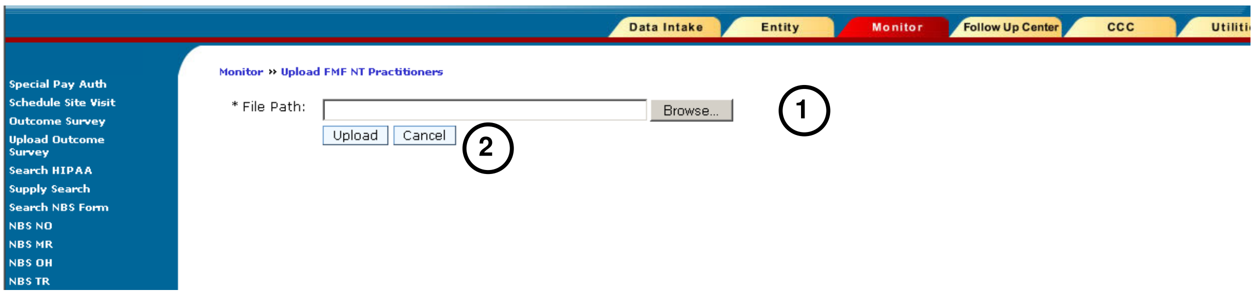
1. The file to be uploaded.
2. **Buttons**:
    c. Upload button to upload the file.
    d. Cancel button to cancel the upload. It displays the same page as in Figure 1.

Upload NT Practitioner Medians

Monitor » Upload NT Practitioner Medians

This screen allows GDSP to upload NT practitioner median data files into SIS in an electronic format. The file must be in the same data format as that specified in the Specifications - NT Practitioner Median Data Workflow.doc document.

FIGURE 1

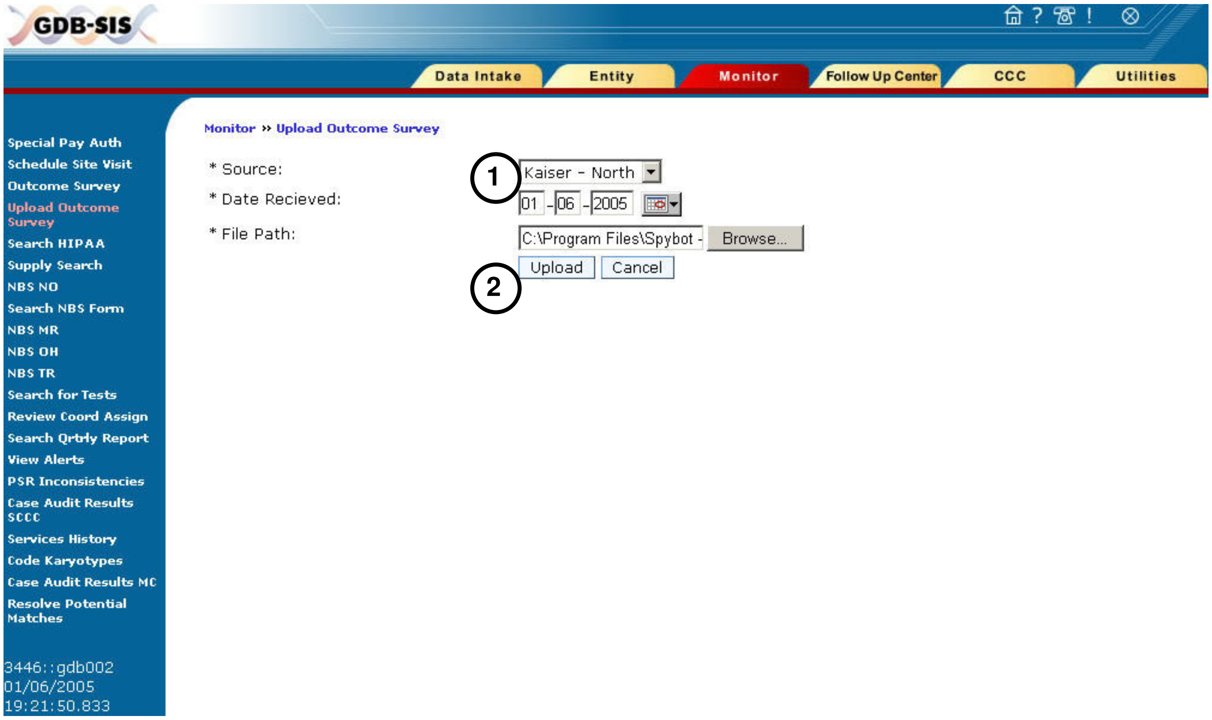


1. The file to be uploaded.
2. **Buttons**:
    e. Upload button to upload the file.
    f. Cancel button to cancel the upload. It displays the same page as in Figure 1.

Upload Outcome Survey

Monitor >> Upload Outcome Survey

This screen allows you to upload a data file containing Outcome of Pregnancy information for multiple clients in SIS.

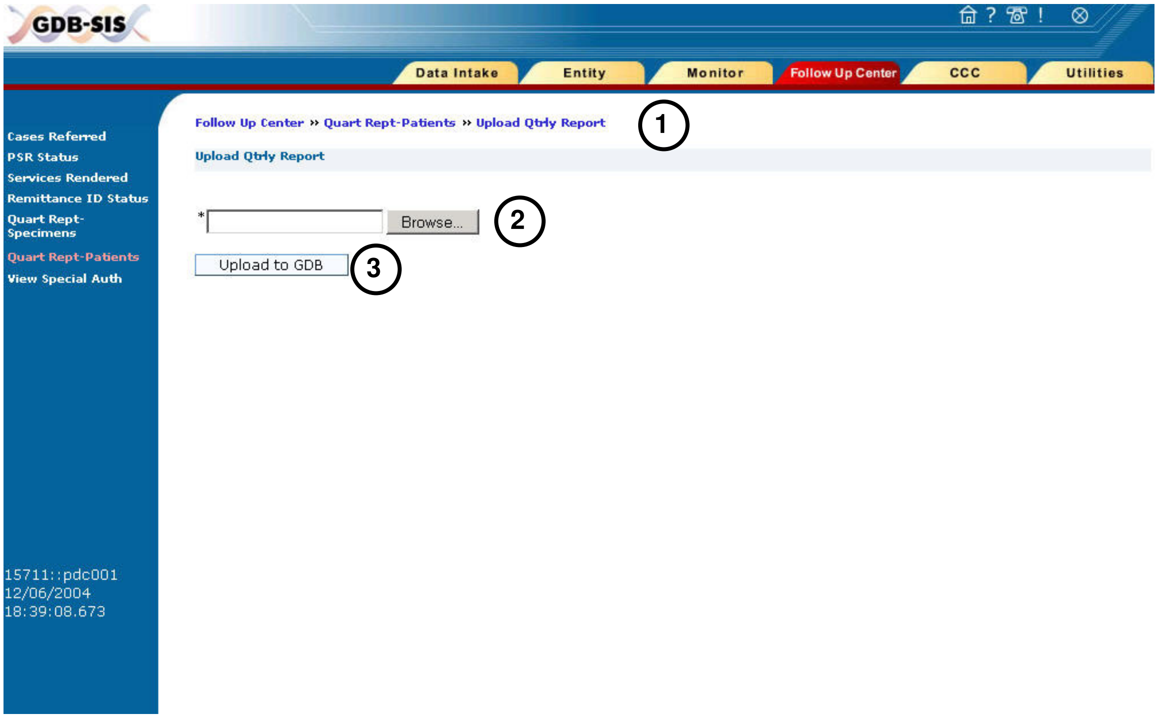


1. **Required Fields:**
   a. **Source** of the outcome survey is a required field, as the file format is different for Kaiser-North and Kaiser-South.
   b. **Date Received** is a required field. You should enter the date you received the electronic file.
   c. **File Path** is a required field. When you click the **Browse** button, a “Choose File” popup window will be displayed, allowing you to find and select the file you want to upload, and will insert the filepath into the field.
2. **Buttons:**
   a. **Upload** button will send your file and corresponding outcome survey data into SIS for processing at the end of the day. You will receive a confirmation in SIS once the file is uploaded.
   b. **Cancel** button clears the information from all fields and reloads the screen, discarding any unsaved data.

Upload Quarterly Report

Follow Up Center >> Quart Rept-Patients >> Upload Qtrly Report

The **Upload Qrtrly Report** screen allows PDCs to upload their quarterly report information from an electronic file. When the file is uploaded a batch validation program will run in the evening to verify the data. You will be able to view the information on the Quarterly Report-Patients screen the following day.



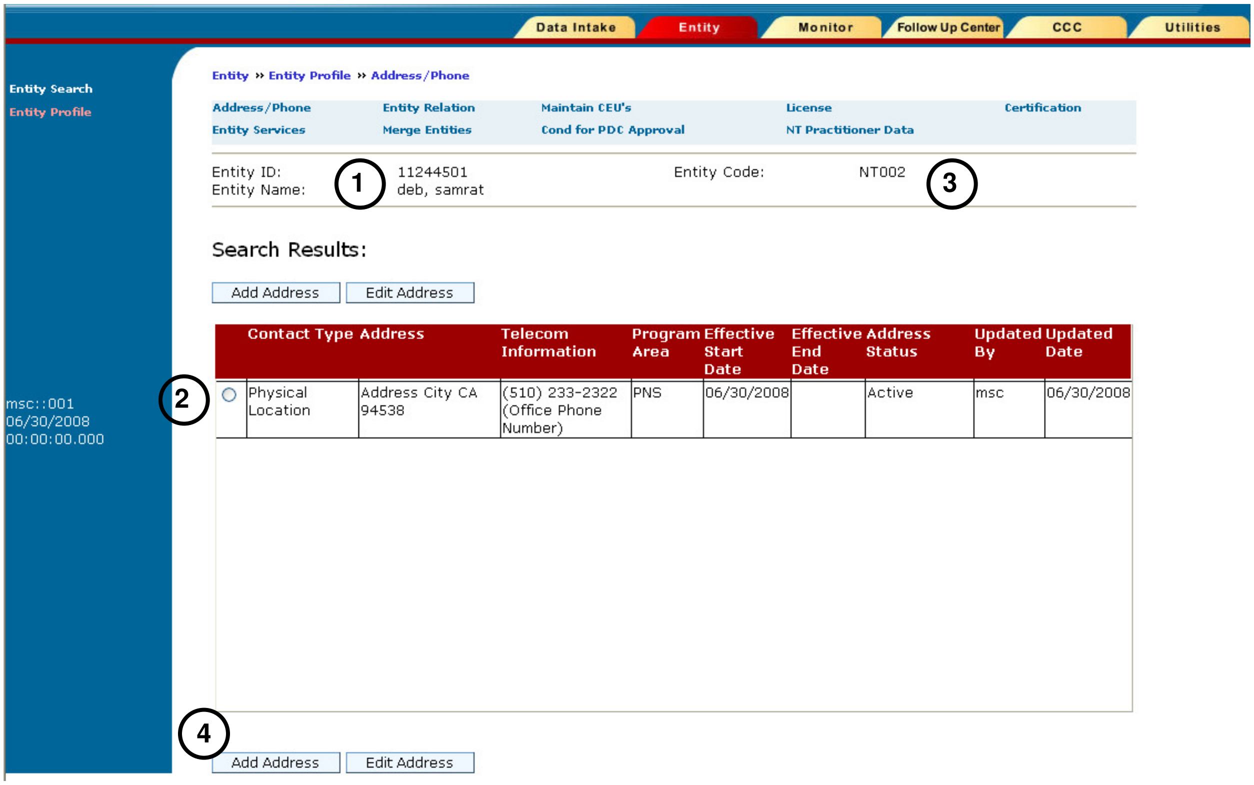
1. Navigation and screen name.
2. File path is a required field denoted by the (*). When you click the **Browse** button a “Choose File” pop-up window will be displayed. This allows you to find and select the file you want to upload and will insert the file path into the field.
3. **Upload to GDB** button will send the file pop-up you have selected using the Browse button to the SIS server where it will be processed by a batch program and uploaded into the database. SIS will reload the screen. You will be able to view the data the next day on the Quarterly Report-Patients screen. Quarterly report data may only be updated once per quarter for each PDC.

   Note: The file to be uploaded must be in XML format. Please refer to Appendix H – Quarterly Report XML Format to view the XML template.

View Address

Entity >> Entity Profile >> Address/Phone

The **View Address** screen is used to display addresses for a given entity. From this screen you can select an entity's existing address to edit or create a new address for an entity.



1. Displays information about the entity that is currently selected in a read-only format based on the entity profile.
2. **Search Results** grid. To select an address for editing, click the radio button next to the address you wish to edit.
3. The user can add or edit NT Practitioner phone & address
4. **Buttons:**
    a. Click the **Edit Address** button to edit the selected address for the entity.
    b. Click the **Add Address** button to add a new address for the entity.
    c. As part of **PEII** change, NT Practitioner data is editable only if the login user has "**Allow NT**" special permission. If the special permission is not provided for the user, **Add Address** and **Edit Address** buttons are disabled on the screen for NT Practitioner data.

View Alerts

Monitor >> View Alerts

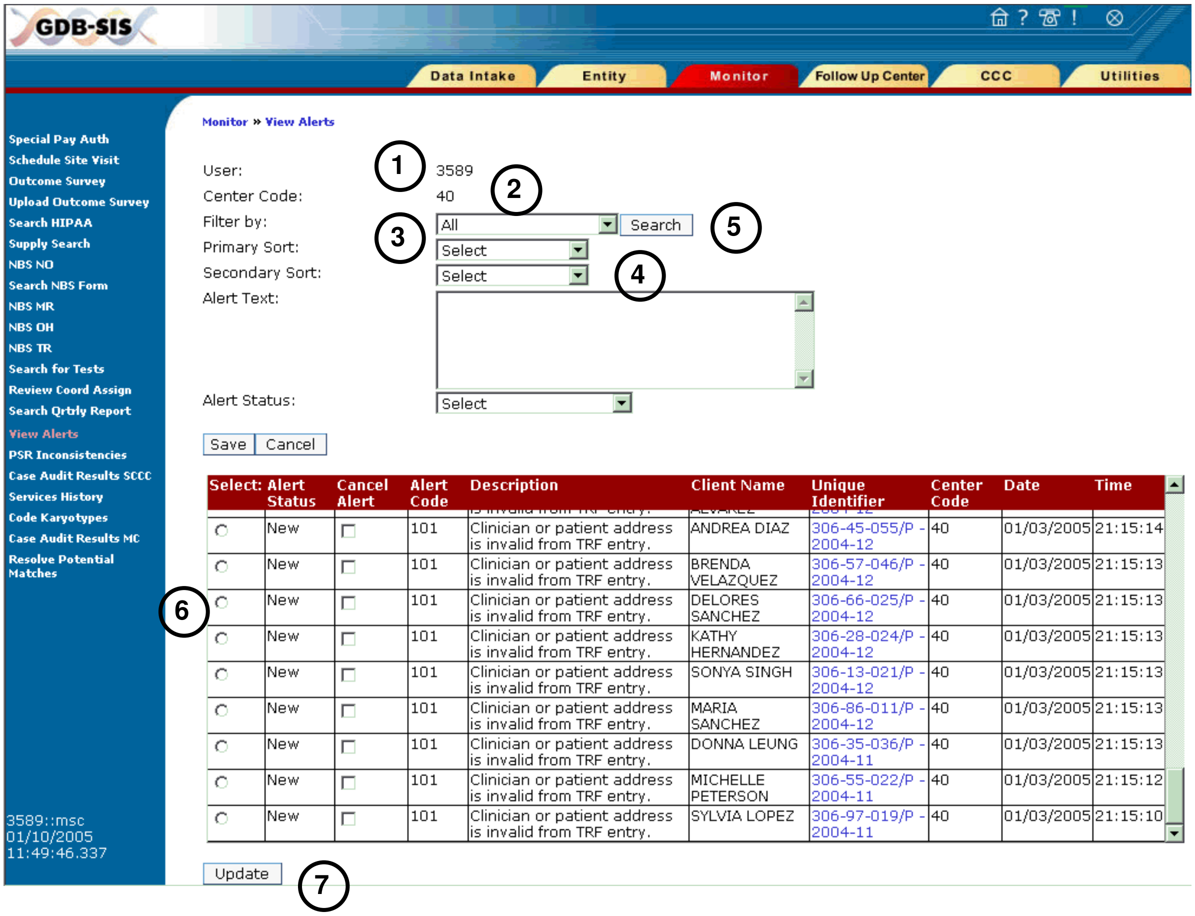
The **View Alerts** screen offers a central repository for a user to view and update the status of all of the alerts he/she has received. This is the screen that Monitors are brought to by default when they enter SIS. Alerts are used in SIS to communicate various messages about a case. Alerts may be generated automatically by SIS, or triggered by the actions of another end-user. For example, the follow-up center may input information into SIS that requires your attention.

The **View Alerts** screen will be used to view predefined alerts that already exist in SIS. SIS will also allow selected users to set custom alerts. For more details, see the Set Case Alerts screen.

Alerts are indicated by an exclamation point (!) on the far right side of the Headline Case grid, or at the top of the SIS screen. This screen will display all new alerts for PEII.

View Alerts (continued)

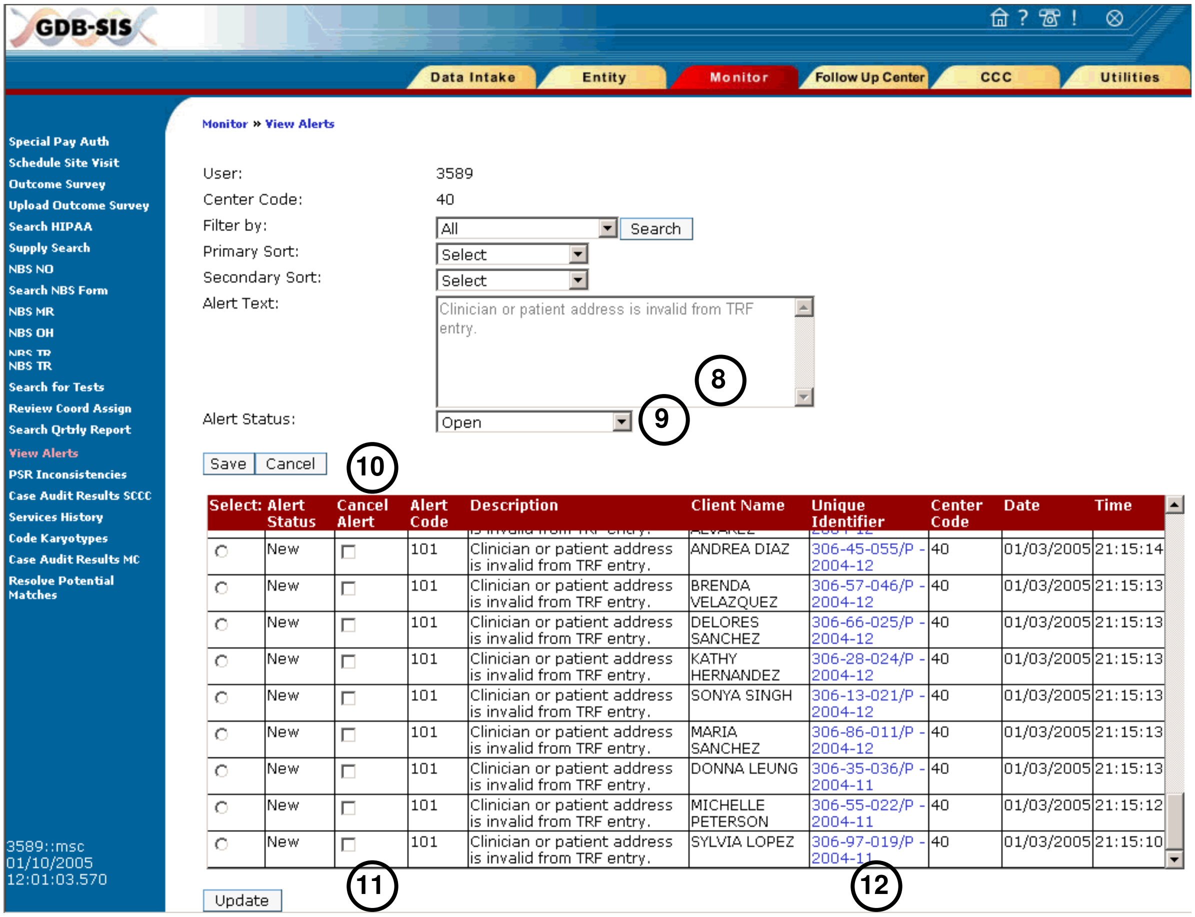
FIGURE 1



1. **User** field displays your User ID number in a read-only format, based on your log in information.
2. **Center Code** displays your facility's code, based on your log in information.
3. For GDB Registry users, the **Filter By** dropdown allows you to select only certain types of alerts to view; i.e. NTD, Chromosomal Defect, or DC Registry.
4. You may use the **Primary** and **Secondary** sort dropdowns to identify the sort order in which alerts will be displayed in the alerts grid.
5. Click the **Search** button once you have identified your filter or sort criteria to display matching records. If you do not specify any filter criteria, all of your alerts will be displayed.
6. Click a radio button next to an alert in the alerts grid to select it in order to change the Alert Status.
7. Click the **Update** button after you have selected an alert record to update the Alert Status.

View Alerts (continued)

FIGURE 2



8. **Alert Text** box contains text describing the selected alert in read-only format.
9. **Alert Status** displays the current status of a selected alert. To modify the status of a selected alert, select a different value in the dropdown box, then click the **Save** button. The default value for a new alert will be ‘New’. If a user clicks on the alert through the View Alerts screen, or if a user updates it, it’s status will change to ‘Open’. Users may also change the Alert Status to one of the following: New information, Call needs to be made, Return call expected, Form to be resent, Return form expected, or Closed.
10. **Buttons**:
    a. Click the **Save** button to save the change to the Alert Status.
    b. Click the **Cancel** button to cancel the update action without saving.
11. Click the check box in the **Cancel Alerts** column, then click the Save button to cancel an alert and remove it from the alerts grid.
12. Click an Accession Number link to navigate to the Case Summary screen. The screen will navigate to the old case summary screen for Pre PE II cases, and the new Case Summary screen for Post PEII cases.

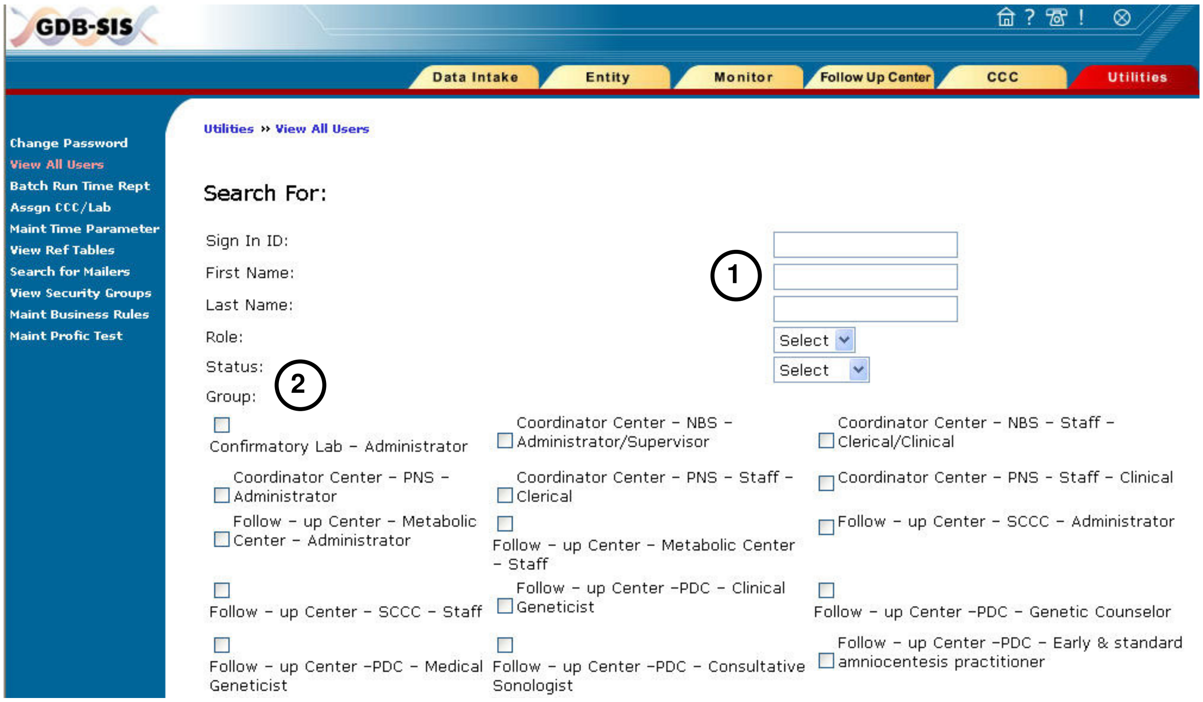
View All Users

Utilities >> View All Users

The **View All Users** screen is used to manage existing user account information and group membership.

Note: to create a new user in SIS, use the Entity Relation screen.

FIGURE 1



1. In order to update a user's account information and group membership, you must first search for an existing user. Enter one or more criteria in the **Search For** fields, then click the **Search** button (see # 3).
2. Displays a list of all Security Groups that exist in SIS. Select one or more **Group** to search for all users belonging to the selected groups.

Note: You must use the Create New User screen to add or delete group membership for a user.

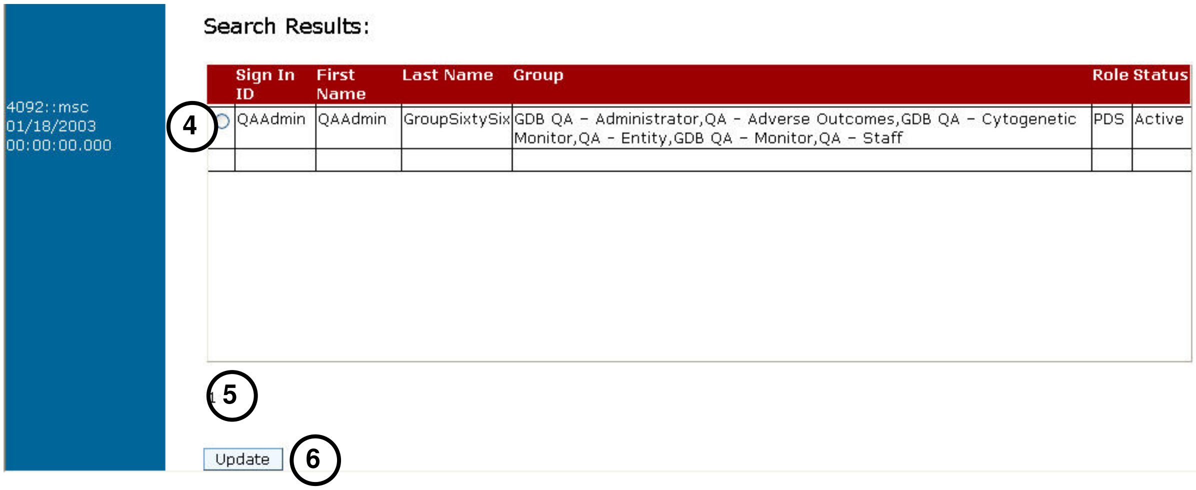
View All Users (continued)

FIGURE 2

3. Click the Search button to search for an existing user based on the search criteria you have entered.

View All Users (continued)

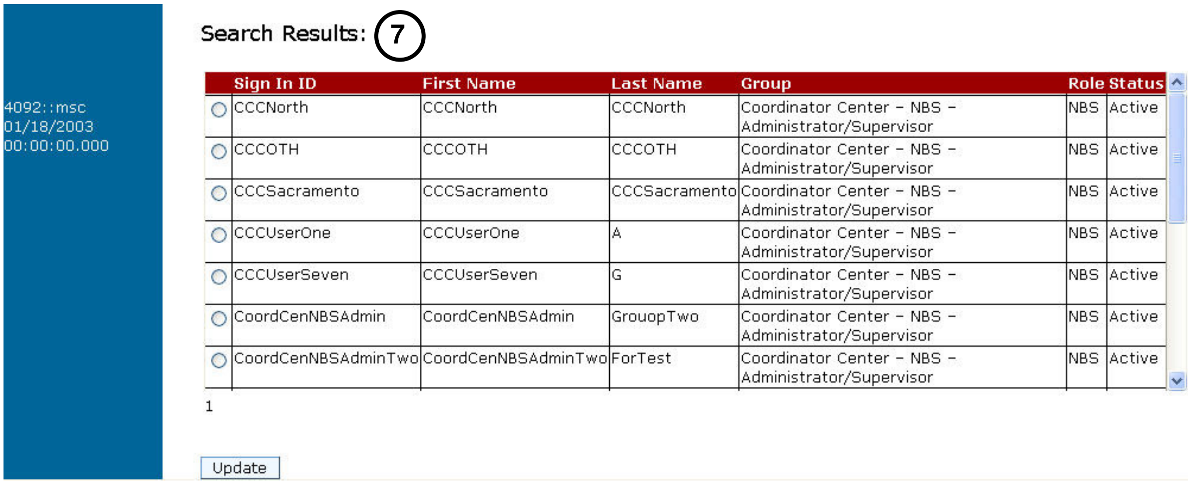
FIGURE 3



4. **Search Results** grid displays all user groups matching the search criteria you have entered.
5. If the search returns more than one page of results you can navigate to the additional results pages by clicking the **Page Number** link below the Search Results grid.
6. Click the radio button next to the account Sign In ID and then click the **Update** button to edit the user account.

View All Users (continued)

FIGURE 4



	Sign In ID	First Name	Last Name	Group	Role	Status
◯	CCCNorth	CCCNorth	CCCNorth	Coordinator Center - NBS - Administrator/Supervisor	NBS	Active
◯	CCCOTH	CCCOTH	CCCOTH	Coordinator Center - NBS - Administrator/Supervisor	NBS	Active
◯	CCCSacramento	CCCSacramento	CCCSacramento	Coordinator Center - NBS - Administrator/Supervisor	NBS	Active
◯	CCCUserOne	CCCUserOne	A	Coordinator Center - NBS - Administrator/Supervisor	NBS	Active
◯	CCCUserSeven	CCCUserSeven	G	Coordinator Center - NBS - Administrator/Supervisor	NBS	Active
◯	CoordCenNBSAdmin	CoordCenNBSAdmin	GrouopTwo	Coordinator Center - NBS - Administrator/Supervisor	NBS	Active
◯	CoordCenNBSAdminTwo	CoordCenNBSAdminTwo	ForTest	Coordinator Center - NBS - Administrator/Supervisor	NBS	Active

1

Update

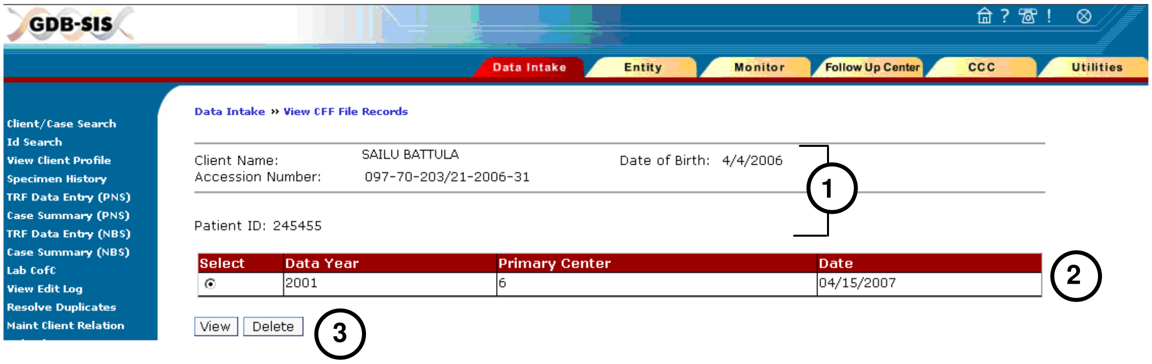
7. The View All Users screen is also displayed when the user selects a security group in the View Security Groups screen and clicks the Show Users button. In this case all of the users who belong to the selected security group are displayed in the Search Results section of the View All Users screen.

View CFF File Records

Data Intake >> View CFF File Records

This screen displays the details of the records transmitted in the Cystic Fibrosis Foundation files that are uploaded into SIS from the Upload CFF File screen.

FIGURE 1



1. Displays client and case information in read-only format.

1 Lists all of the CFF file records received for the client in the grid. Use the **Select** radio button to indicate the specific CFF file data to be displayed.

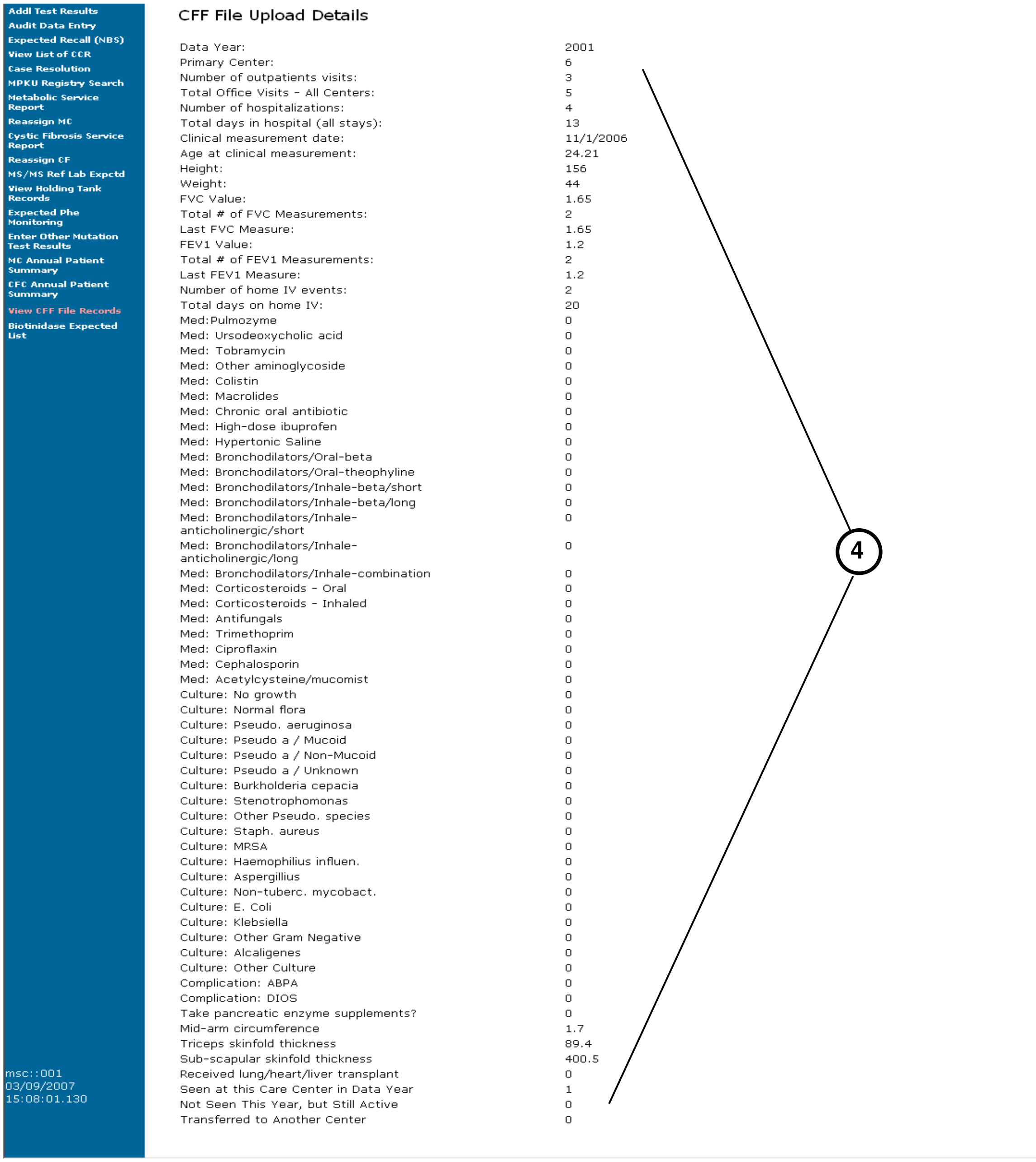
3. **Buttons:**

   a. **View:** Displays the CFF file record selected in the grid in read-only mode.

   b. **Delete:** Deletes and removes the record that is selected in the grid. This function is primarily used so that records can be reloaded from the CFF file if they are incorrect.

View CFF File Records (continued)

FIGURE 2



CFF File Upload Details

Data Year:	2001
Primary Center:	6
Number of outpatients visits:	3
Total Office Visits - All Centers:	5
Number of hospitalizations:	4
Total days in hospital (all stays):	13
Clinical measurement date:	11/1/2006
Age at clinical measurement:	24.21
Height:	156
Weight:	44
FVC Value:	1.65
Total # of FVC Measurements:	2
Last FVC Measure:	1.65
FEV1 Value:	1.2
Total # of FEV1 Measurements:	2
Last FEV1 Measure:	1.2
Number of home IV events:	2
Total days on home IV:	20
Med:Pulmozyme	0
Med: Ursodeoxycholic acid	0
Med: Tobramycin	0
Med: Other aminoglycoside	0
Med: Colistin	0
Med: Macrolides	0
Med: Chronic oral antibiotic	0
Med: High-dose ibuprofen	0
Med: Hypertonic Saline	0
Med: Bronchodilators/Oral-beta	0
Med: Bronchodilators/Oral-theophyline	0
Med: Bronchodilators/Inhale-beta/short	0
Med: Bronchodilators/Inhale-beta/long	0
Med: Bronchodilators/Inhale-anticholinergic/short	0
Med: Bronchodilators/Inhale-anticholinergic/long	0
Med: Bronchodilators/Inhale-combination	0
Med: Corticosteroids - Oral	0
Med: Corticosteroids - Inhaled	0
Med: Antifungals	0
Med: Trimethoprim	0
Med: Ciproflaxin	0
Med: Cephalosporin	0
Med: Acetylcysteine/mucomist	0
Culture: No growth	0
Culture: Normal flora	0
Culture: Pseudo. aeruginosa	0
Culture: Pseudo a / Mucoid	0
Culture: Pseudo a / Non-Mucoid	0
Culture: Pseudo a / Unknown	0
Culture: Burkholderia cepacia	0
Culture: Stenotrophomonas	0
Culture: Other Pseudo. species	0
Culture: Staph. aureus	0
Culture: MRSA	0
Culture: Haemophilius influen.	0
Culture: Aspergillius	0
Culture: Non-tuberc. mycobact.	0
Culture: E. Coli	0
Culture: Klebsiella	0
Culture: Other Gram Negative	0
Culture: Alcaligenes	0
Culture: Other Culture	0
Complication: ABPA	0
Complication: DIOS	0
Take pancreatic enzyme supplements?	0
Mid-arm circumference	1.7
Triceps skinfold thickness	89.4
Sub-scapular skinfold thickness	400.5
Received lung/heart/liver transplant	0
Seen at this Care Center in Data Year	1
Not Seen This Year, but Still Active	0
Transferred to Another Center	0

4. Displays the details of the CFF file record that was selected from the grid.

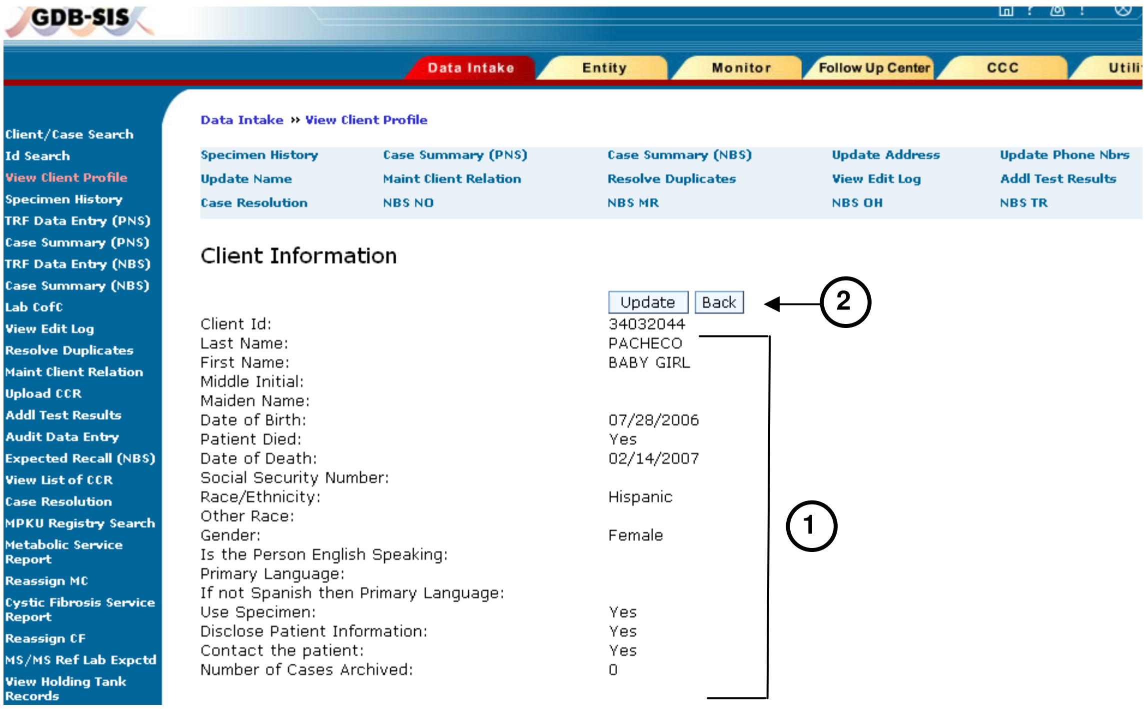
View Client Profile

Data Intake >> View Client Profile

The **View Client Profile** screen displays the client profile summary for a given client. The summary includes the current client information, name history, contact information history, address history, case history, extended screening surveys, and any scanned documents associated with the client.

Please note that when updating information from the Client Profile screen, the information will NOT be reflected on the Case Summary screen. If information is updated on the Update Case screen, it will appear on the Client Profile screen.

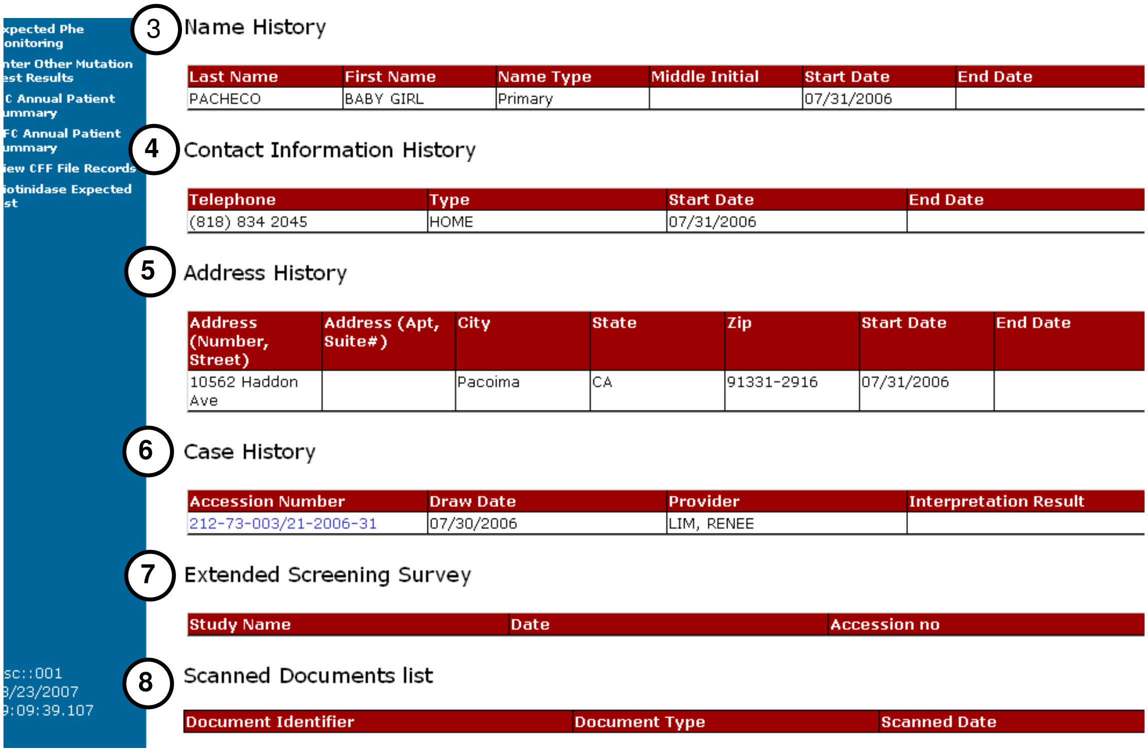
FIGURE 1



1. This section displays current information about the client from the TRF.
2. Buttons:
   a. **Update:** Navigates to the Client Profile screen where changes can be made to the client information (See Figure 3).
   b. **Back:** Returns to the previous screen.

View Client Profile (continued)

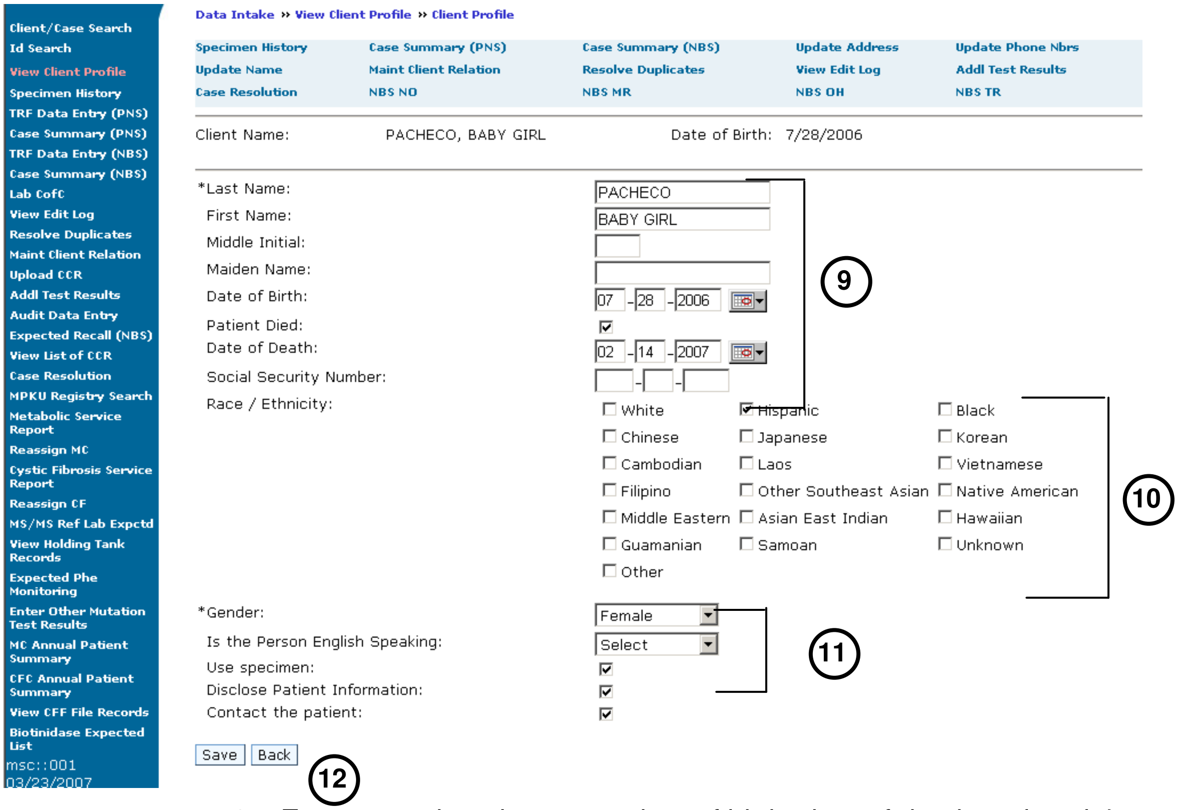
FIGURE 2



3. The **Name History** grid displays a history of names the client has used in the past, along with the Start Date and End Date of each.
4. The client's previous telephone numbers are displayed in the **Contact Information History** grid along with the Start Date and End Date of each.
5. The client's previous addresses are displayed in the **Address History** grid, along with the Start Date and End Date of each.
6. The client's linked Accession Numbers are displayed in the **Case History** grid, along with the associated Draw Date, Provider, and interpretation Result. Clicking the Accession Number takes you to the Case Summary screen. All the accession numbers belonging toe the same case are displayed.
7. The **Extended Screening Survey** grid displays the Study Name, Date, and Accession Number.
8. The **Scanned Documents List** provides a list of documents associated with the client that have been scanned into the system, and will allow you to access the image for each.

View Client Profile (continued)

FIGURE 3



9. Enter or update the name, date of birth, date of death and social security number for the client.
10. **Race/Ethnicity:** Select the appropriate ethnicity information in the checkboxes. The race/ethnicity section will accept multiple checkmarks.
11. Select the **Gender** from the dropdown box.
12. **Buttons:**
    a. **Save:** Saves all changes.
    b. **Back:** Returns to previous screen without saving.

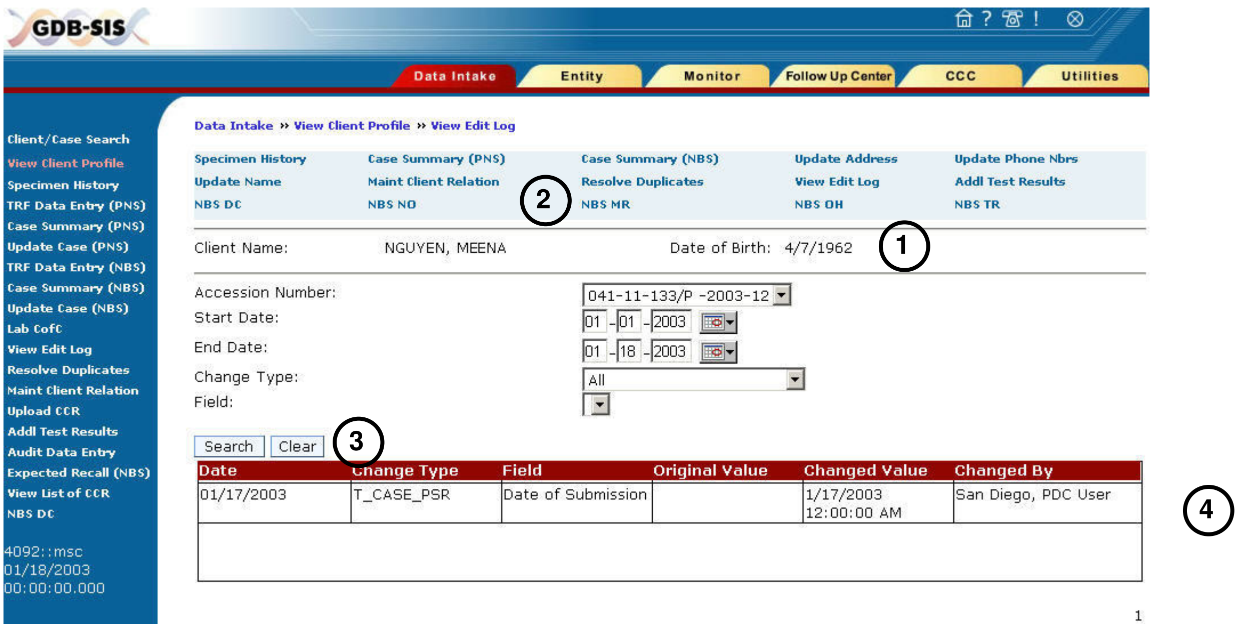
Note: The Use Specimen, Disclose Patient Information and Contact the Patient checkboxes should only be updated

View Edit Log

Data Intake >> Client Case/Search >> View Edit Log

This screen is used to search for and view the record of changes (edit log) made to a Pre PE II Case. Based on the accession number the application loads the Pre or Post PE II screen for the case.

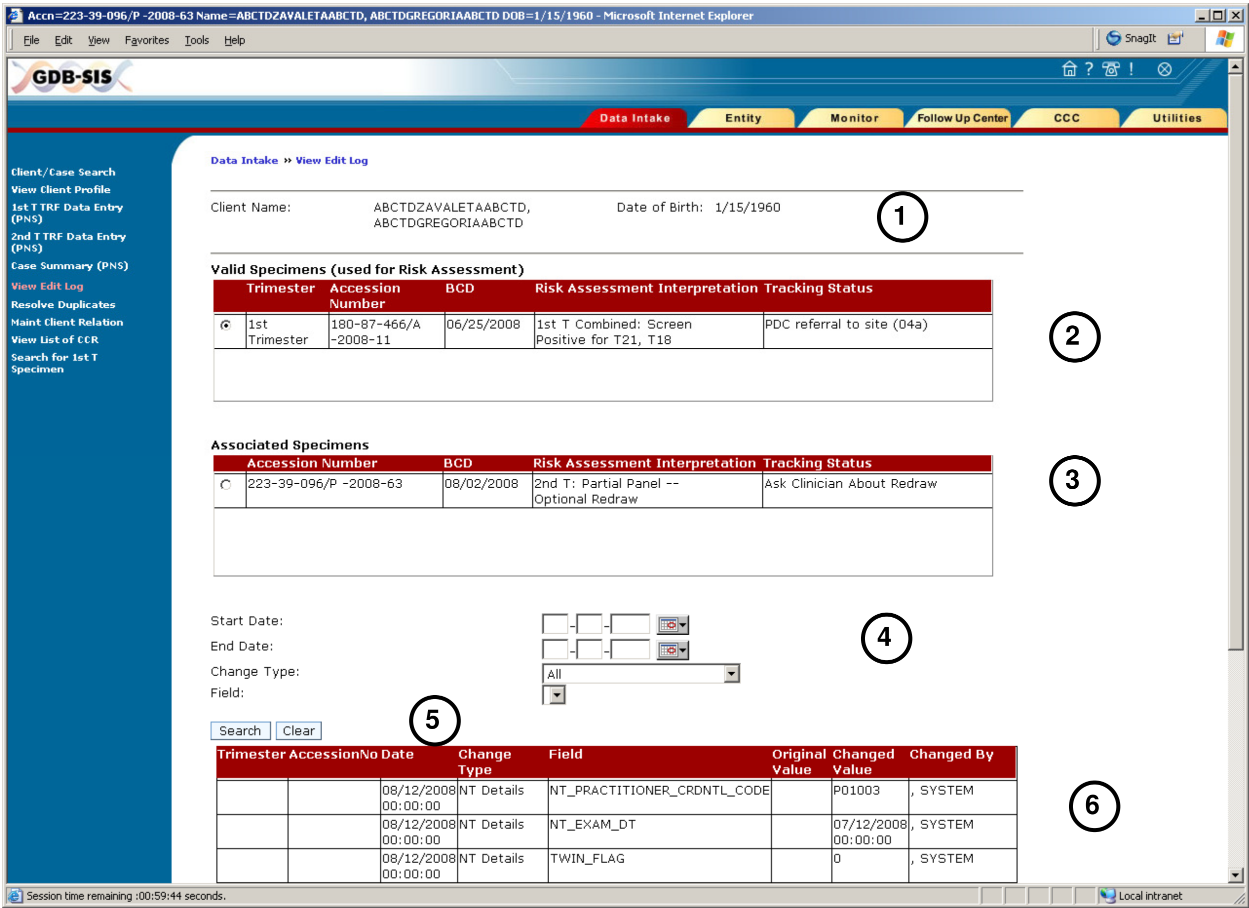
FIGURE 1



1. **Client Information** is displayed in read only format.
2. **Search Criteria:**
   a. **Accession Number** – Unique number associated with the client specimen.
   b. **Start Date** – enables to specify start date for a specific time period to search.
   c. **End Date** – enables to specify end date for a specific time period to search.
   d. **Change Type** – enables to specify the change type like master data etc.,
   e. **Field** – enables to specify the field under the change type.
3. **Buttons**:
   a. **Search** – Search for edit log records based upon entered search criteria.
   b. **Clear** – Clears the information from all fields, and reloads a blank screen
4. **Edit Logs** based on the search criteria are displayed in a read only format. The information includes Trimester, Accession Number, Date, Change Type, Field, Original Value, Changed Value, changed By

View Edit Log (continued)

This screen is used to search for and view the record of changes (edit log) made to a Post PE Case. Based on the accession number the application loads the Pre or Post PE II screen for the case.



1. **Client Information** is displayed in read only format.
2. The information about the **Valid Specimens used for Risk Assessment** is displayed in a read only format. The information includes Trimester, Accession Number, BCD, Risk Assessment Interpretation and Tracking Status.
3. The information about the **Associated Specimens used** is displayed in a read only format. The information includes Accession Number, TRF Number, BCD, Risk Assessment Interpretation and Tracking Status.
4. **Search Criteria:**
    a. **Accession Number** – Unique number associated with the client specimen.
    b. **Start Date** – enables to specify start date for a specific time period to search.

View Edit Log (continued)

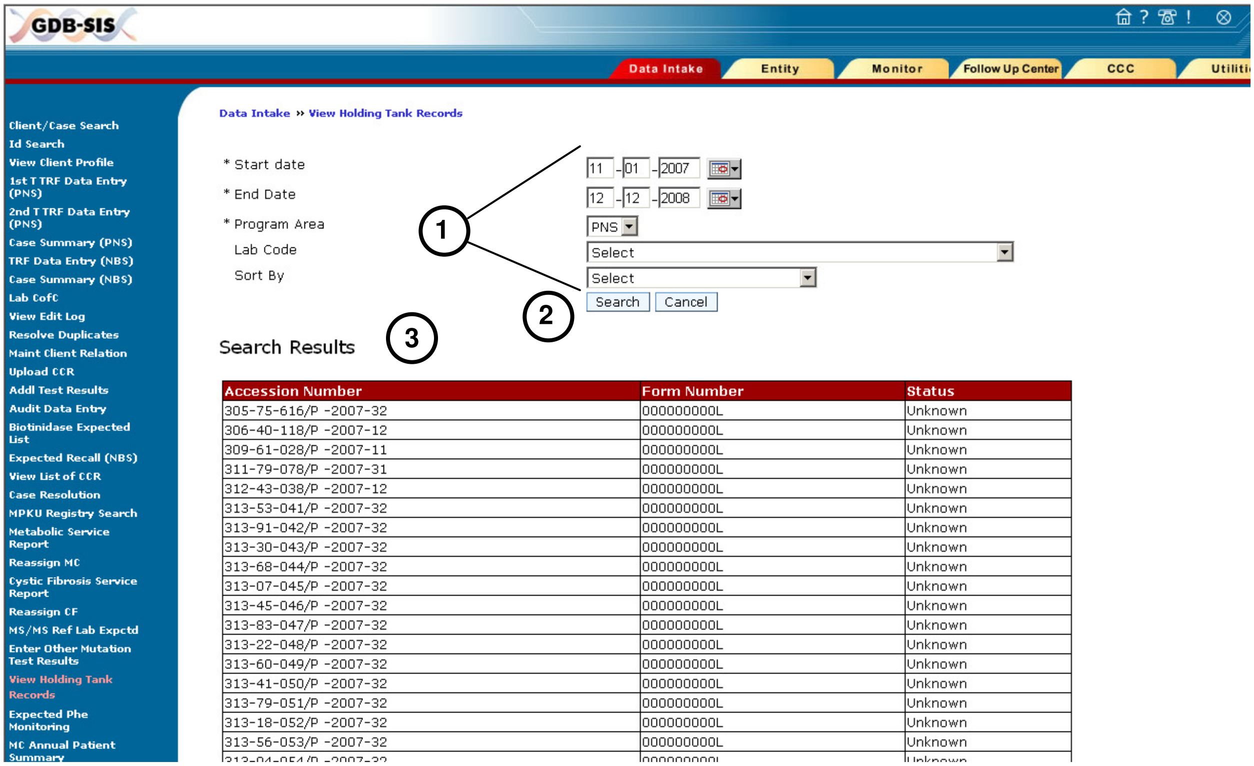
   c. **End Date** – enables to specify end date for a specific time period to search.
   d. **Change Type** – enables to specify the change type like master data etc.,
   e. **Field** – enables to specify the field under the change type.

5. **Buttons**:
   a. **Search** – Search for edit log records based upon entered search criteria.
   b. **Clear** –Clears the information from all fields, and reloads a blank screen
6. **Edit Logs** based on the search criteria are displayed in a read only format. The information includes Trimester, Accession Number, Date, Change Type, Field, Original Value, Changed Value, Changed By.

View Holding Tank Records

Data Intake » View Holding Tank Records

The **View Holding Tank Records** screen is used to Holding Tank records between a given time period having a start date and an end date with a selected Program Area. The lab code and the Sort By fields are optional to narrow the search criteria.



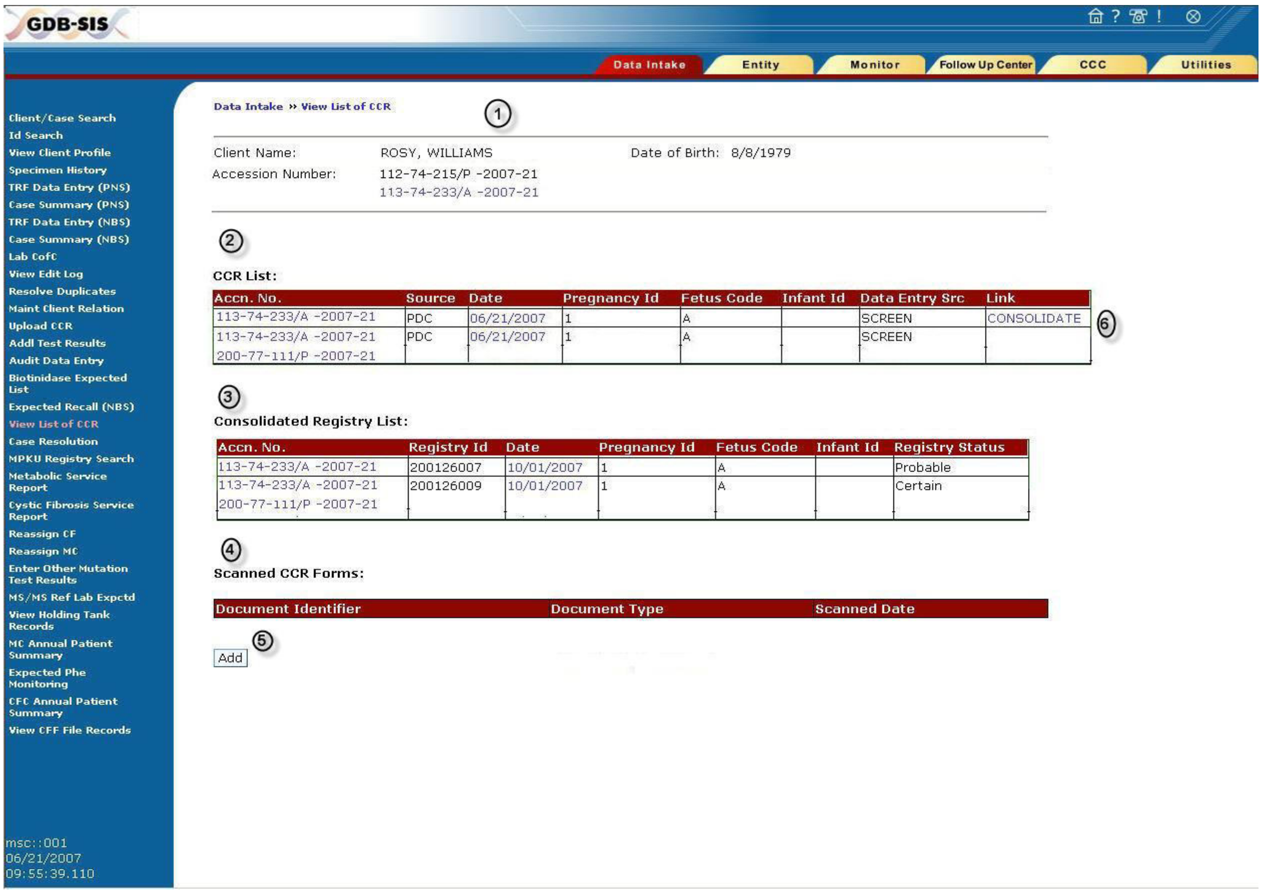
1. Search Criteria to be provided. Start Date, End date and Program area are to be provided mandatorily. Lab Code and Sort By are used to further narrow the Search.
2. **Buttons:**
   d. Click the **Search button** to search using the provided search criteria.
   e. Click the **Cancel** button to reset the search criteria.
3. **Search Results** grid. Displays the Accession number, Form number and Status in read-only format.

View List of CCRs (Confidential Case Reports)

Data Intake >> View List of CCR

This screen allows you to view a list of CCR and Consolidated Registry for a client, and add a new CCR, edit CCR, edit consolidate source in SIS. This screen also provides a link the CCR screen and consolidate screen, where you can view and enter CCR and consolidate data.

FIGURE 1



1. The client's basic information is displayed in a read-only format based for the case.
2. **CCR List** grid displays the CCR sources, the date the CCRs were completed, **pregnancy Id, Fetus Code, Infant Id, Data Entry Src** and **Link** based on the information entered in the fields above. If the case has two valid Accn Numbers (1st and 2nd trimester) those will be displays as one row in the CCR grid
    a. **Accn No** – Clicking an Accession Number link will navigate to the old Case Summary (PNS) screen for Pre PEII Cases and will navigate to the new Case Summary (PNS) screen for Post PEII Cases. If the case has two valid Accn numbers those will be displayed as one row.
    b. **Date** – when clicking on the date values (hyperlinks) you will navigate to the **CCR** screen, which allows you to view and edit the existing CCR

View List of CCRs (Confidential Case Reports) (continued)

information. If a CCR has not yet been entered, the **CCR** screen allows you to enter data for a new CCR.

While multiple sources can be added to the View List of CCR screen, there is only one screen for CCR data. If there is more than one CCR source available, you must make independent choices regarding which data to enter. In effect, you will pre-consolidate the CCR sources, prior to registry consolidation. The List of CCRs serves to document the various sources used for the pre-consolidated CCR.

c. **Link** – directs you to the Consolidated Registry screen, which allows you to view and edit the existing Consolidated Registry information.

3. Consolidated Registry grid displays the Consolidated Registry sources, the date the Consolidated Registry were completed, **pregnancy Id, Fetus Code , Infant Id, Registry Status** based on the information saved at the time of creating consolidated registry .

   If the case has two valid Accn Numbers (1st and 2nd trimester) those will be displays in the one row in the CCR grid

View List of CCRs (Confidential Case Reports) (continued)

a. **Accn No** – Clicking an Accession Number link will navigate to the old Case Summary (PNS) screen for Pre PEII Cases and will navigate to the new Case Summary (PNS) screen for Post PEII Cases. if the case has two valid Accn Numbers those will be displayed in the one row.

b. **Date** – clicking into the hyperlink will direct you to the Consolidated Registry screen, which allows you to view and edit the existing Consolidated Registry information.

4. This grid displays the **Document Identifier**, **Document Type** and the **Scanned Date** of the scanned CCR forms associated with the client and the case.

5. **Add** button allows you to identify a new CCR source for the case.

FIGURE 2

6. **View Consolidated CCR** link directs you to the **CCR** screen, which allows you to view and edit the existing CCR information. If a CCR has not yet been entered, the **CCR** screen allows you to enter data for a new CCR.

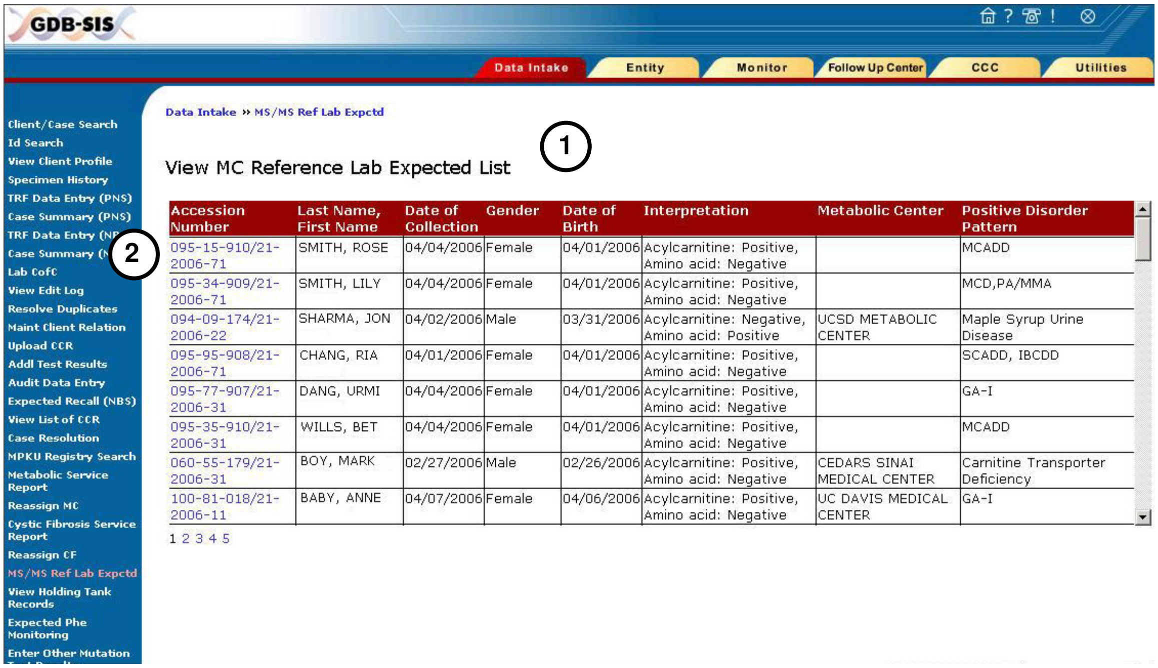
- While multiple sources can be added to the View List of CCR screen, there is only one screen for CCR data. If there is more than one CCR source available, you must make independent choices regarding which data to enter. In effect, you will pre-consolidate the CCR sources, prior to registry consolidation. The List of CCRs serves to document the various sources used for the pre-consolidated CCR.

View MC Reference Lab Expected List

Data Intake >> MS/MS Ref Lab Expctd

This screen will list out all cases with a pending positive MS/MS disorder pattern.

FIGURE 1

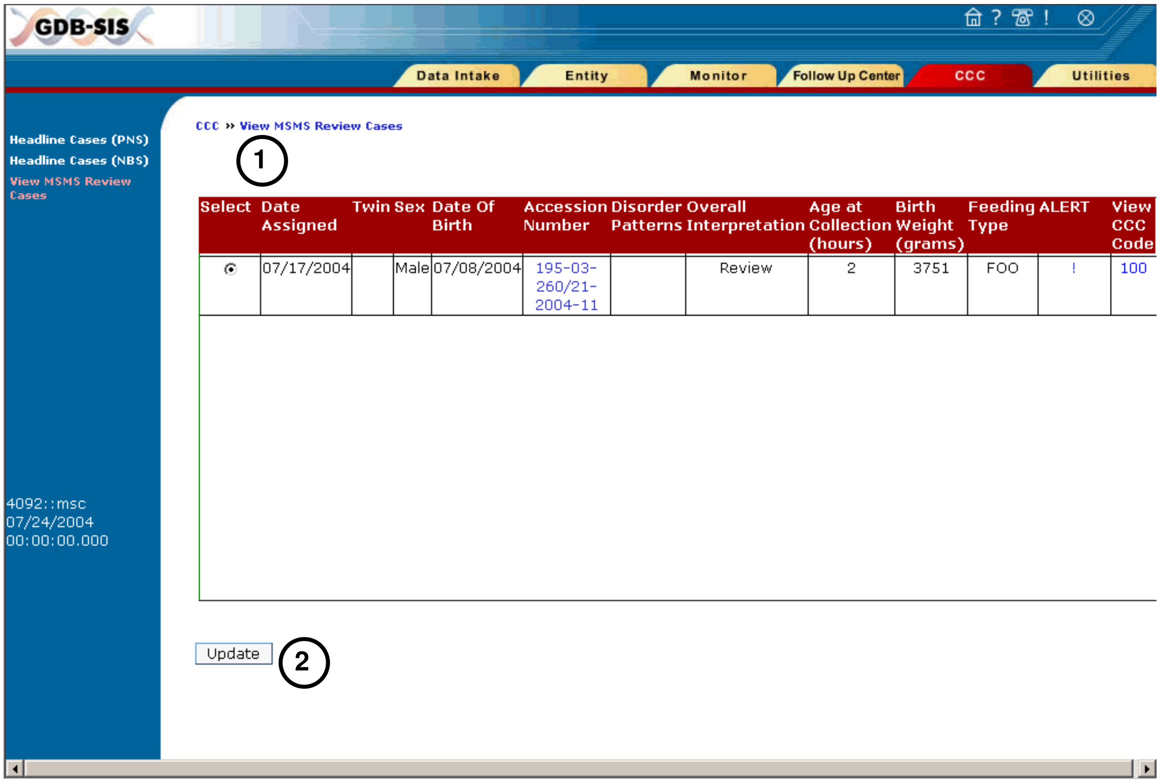


1. This is a read-only screen except for the link on the **Accession Number** field. Click on the **Accession Number** link to go to the Confirmatory Test Results screen for a particular case.
2. All cases shown on this list will remain until the case has been resolved on the case resolution screen.

View MSMS Review Cases

CCC >> View MSMS Review Cases

This screen displays all cases with an interpretation of "review". This screen is used by case coordinators to view cases that cannot be determined by the interpretation algorithm.

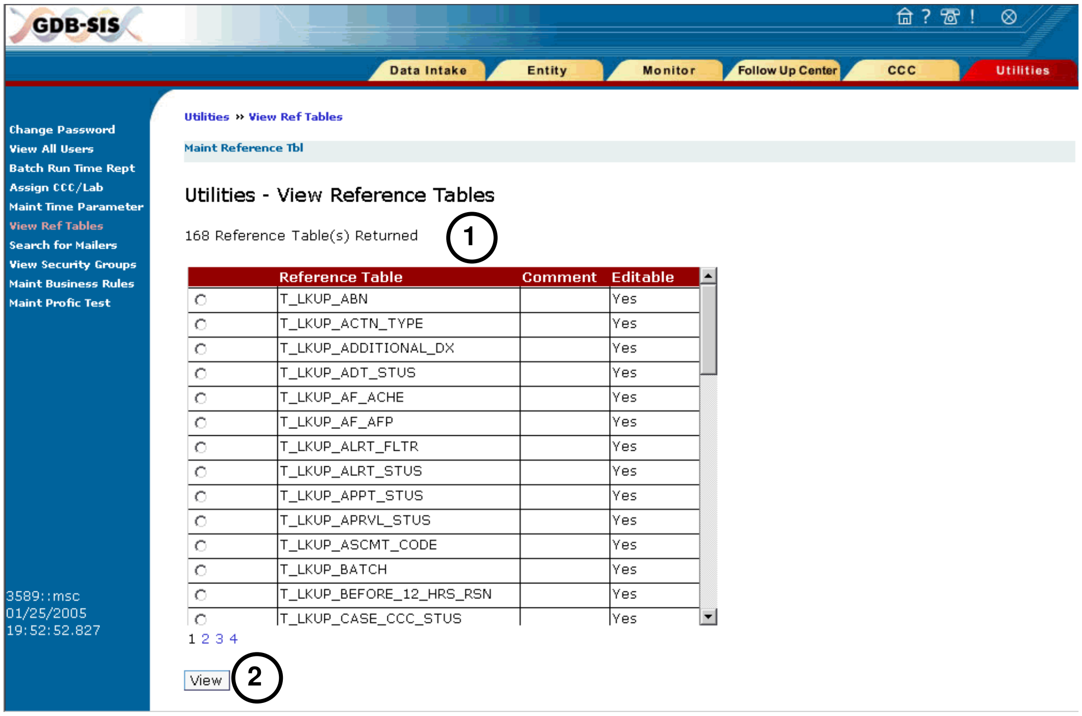


1. Records with an Overall Interpretation of Review are displayed in the data grid. Select a record by clicking the radio button in the select column.
2. **Buttons:**
   a. **Update** – update the record selected in the data grid. This will display the Update MS/MS Review Cases screen.

View Reference Tables

Utilities >> View Ref Tables

This screen displays the reference tables used in the SIS application. Values in these tables may be updated using the Maintain Reference Table screen.

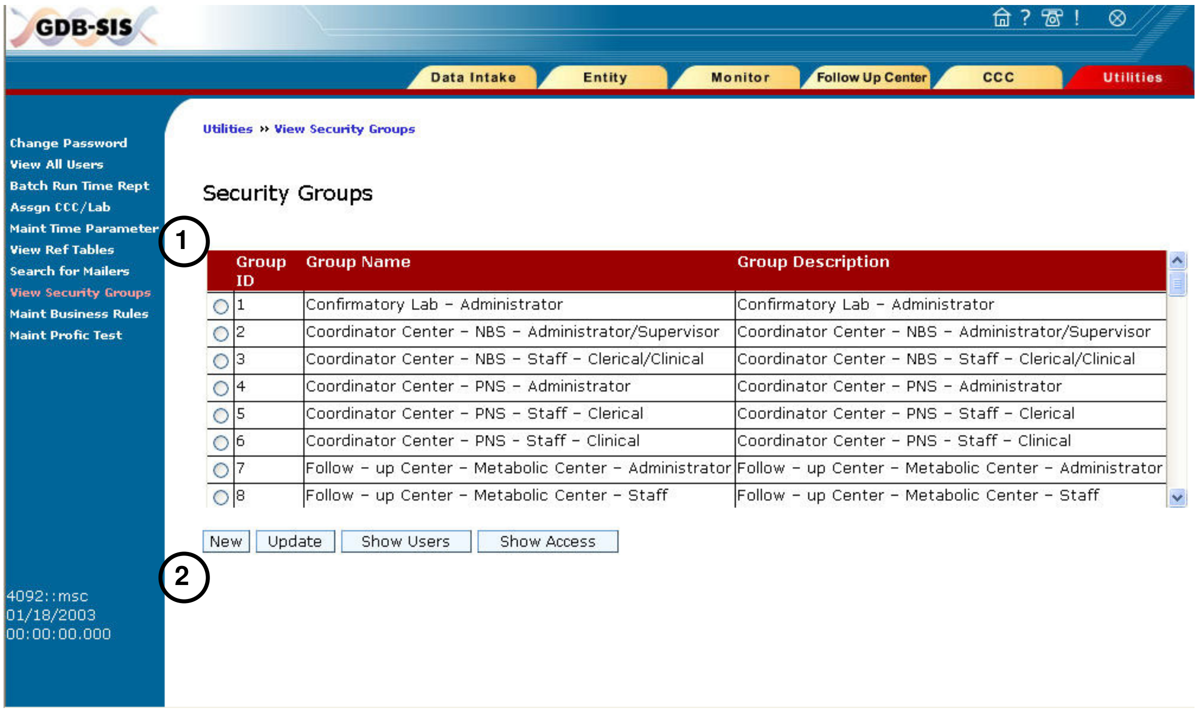


1. The grid contains rows listing each reference table and indicates if it is editable.
2. Select a record in the data grid table by clicking the radio button next to it and click the **View** button to navigate to the Maintain Reference Table screen.

View Security Groups

Utilities >> View Security Groups

The **View Security Groups** screen is used to view, create new and edit existing SIS security groups, and to manage security permissions that each group has for each screen.

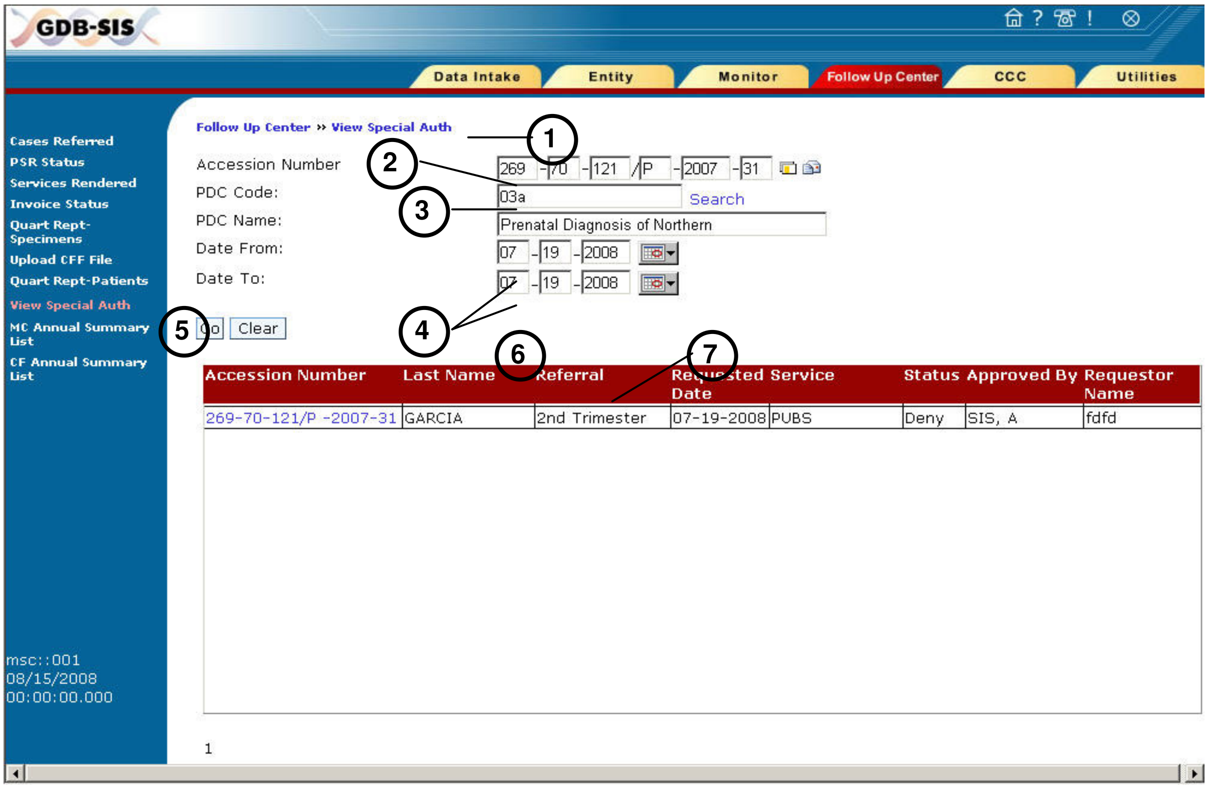


1. The **Security Groups** grid displays all of the existing SIS security groups. Click the radio button next to a security group to select it for editing.
2. **Buttons:**
   a. Click the **New** button to go to the Security Groups screen, and create a new security group.
   b. Click the **Update** button with a security group selected to go to the Security Groups screen, and update the profile for the selected security group.
   c. Click the **Show Users** button with a security group selected to go to the View All Users screen, and display all users who belong to the selected security group.
   d. Click the **Show Access** button to go to the Page Security screen, and display the permission that the selected security group has for each screen.

View Special Service Authorization

Follow Up Center >> View Special Auth

The View Special Authorizations screen will allow you to view follow-up service(s) authorized or denied information for a client at a specific PDC. You may search on the accession number, or on PDC Code or you may search over a range of dates for all of the special payment authorizations that occurred over that range.



1. The Screen name and navigation is displayed. The Module Tab for the screen will be highlighted.
2. You can do a search based on Accession Number. The search will bring up the Special Authorizations or Denials for all the specimens associated with the Case with which the Accession Number is associated.
3. PDC users will have access to the View Special Authorization screen, however they only have access for their own PDC (and satellites, if applicable). The PDC Code field will be pre-populated for PDC users. Other users like GDB Monitor, CCC etc. can enter any PDC code as the search criteria.
4. You can enter a **Date From** and **Date To** range. This range must not exceed 12-months.
5. **Buttons:**
   - e. **Go** – displays all special authorizations for a PDC in the special authorizations grid.
   - f. **Clear** – clears all search criteria entered.

View Special Service Authorization (Continued)

6. Special Authorization search results grid displays the follow-up services authorized for a PDC by the GDB, depending on the search criteria. Clicking the accession number directs the user to the Case Summary screen.
7. The Trimester of the accession number is displayed in the Search Results Grid.

4.0 Glossary

1. **1st Level Link** – see Module Tabs

2. **2nd Level Link** – These are the links that appear on the left-hand side of the SIS screen.

3. **3rd Level Link** – These are the links that appear on the top of the SIS screen, just below the module tabs.

4. **Alert** - An alert is an important message to a SIS user. They appear in a number of places in the system, identified by an exclamation (!) point.

5. **Batch Interface** – A batch interface transfers data from one computer system to another at regularly scheduled intervals.

6. **Button** – Buttons are small graphics that trigger some action in SIS (e.g. Save, Cancel, Search).

7. **Checkbox** – A checkbox can be clicked using a mouse pointer, rather than by using the keyboard. Clicking a checkbox can either add a checkmark, or remove an existing checkmark. Checkmarks are used when more than one value might apply, and multiple checkmarks might be filled.

8. **Column Header** – The column header is the top most row of any data grid. The column headers define the types of data in the grid. Clicking on the column header will often sort the records in the grid by that column.

9. **Diaried Event** – A diaried event is a record of an action or change to a case record in SIS. Diaried Events are automatically generated as a result of user actions or automated actions internal to SIS.

10. **Dropdown** – A dropdown is a field that allows you to view a menu of options for filling the field. Clicking this button reveals multiple selections, which “drop down” in a small menu. Clicking one of the data selections results in the field being populated by this data. A dropdown field may only be populated by one of the listed selections. Typically, you will not be able to type data into a dropdown field.

11. **Edit mode** – A screen is in edit mode when the values displayed can be changed. These values may be fields, checkboxes, radio buttons, dropdowns, or other data elements.

12. **Entity** – An entity is any person or organization associated with the Genetic Disease Branch. Examples of entity types include hospitals, clinicians, PDCs, and CCCs. Hospital Codes or Clinician Code are two examples of Entity Codes. A Hospital Name may also be referred to as an Entity Name.

13. **Export** – Saving a set of data from the SIS system in an alternative file format is known as exporting. Typical export file types include Microsoft Excel (*.xls), Adobe Acrobat (*.pdf), and comma-separated value (*.csv).

14. **Field** – A cell (small box) that may or may not contain data, or allow data to be entered. Read-only fields may not be edited.

15. **Grayed out** – Fields, buttons, or values are grayed out when they are visible, but cannot be edited. Typically they are a light grey color, in contrast with the standard black color when they can be edited.

16. **Grid** – The SIS documentation often refers to “grids”. These are tables displayed on a screen in SIS containing various types of data such as patient information, entity information, alerts, etc.

17. **Hyperlink** – A link appears as blue text on the SIS screen. Placing the mouse pointer over the text causes it to become underlined. Clicking on a link allows users to navigate to another screen. A Hyperlink is also known as a link.

18. **Inconsistency** – PSR inconsistencies are errors or omissions in the PSR that are automatically detected by the system. These inconsistencies generate error messages, and must be resolved manually by updating the records, or via GDB overriding the inconsistency.

19. **Link** – Hyperlinks appears as blue text on the SIS screen. Placing the mouse pointer over the text causes it to become underlined. Clicking on a link in SIS allows a user to navigate to another screen. A Link is also known as a Hyperlink.

20. **Linking** – Used to describe: 1) a connection made between two Accession Numbers. For example, if an inadequate specimen were received, the redraw specimen would be automatically “linked” to the initial specimen in SIS. 2) A relationship between a client and an entity. For example, an NBS client may be linked to a hospital.

21. **Matching** – Used to describe the built-in calculation function that will identify two records to be linked or merged.

22. **Merging** – Used to describe two separate clients or entities becoming one in SIS. For example, if a Test Request Form (TRF) contains provider information that SIS does not recognize, that provider will be added to SIS as a “one-time provider.” If a user were able to determine that this “one-time provider” was the same as an existing provider, the user could “merge” the two, making them one record.

23. **Module Tabs** - (1st Level Links) - Modules are groupings of screens that will help specific user groups accomplish their work. Your specific user group will determine what module tabs are available to you. These module tabs are the highest level of navigation available in SIS and sit across the top of the screen.

24. **Navigate (Navigation)** – The action of moving from one place in SIS to another, using links, buttons and tabs.

25. **OCR** – Optical Character Recognition. This technology allows the user to scan paper forms (such as Test Request Forms, NBS Forms, Outcome Surveys, etc.)

that have been filled out manually, and automatically recognize and load the written data into the system.

26. **PNS** –Prenatal Screening. This term will be used to describe the program also known as the Expanded Alphafetoprotein (XAFP) Program.

27. **Populated** – Populated fields are fields that are automatically filled with data values by the system.

28. **Print Dialog box** – The print dialog box is the window that appears when users choose a print action in SIS. The print dialog box allows users to choose the output device, set paper orientation, and perform other printing configuration activities.

29. **PSR** – PSR stands for Patient Services Report. This SIS report will replace the PDPR (Prenatal Diagnosis Program Report), which was used in Data General. PSRs are used to track services provided to patients at Prenatal Diagnosis Centers.

30. **PSR Inconsistency** – PSR inconsistencies are errors or omissions in the PSR that are automatically detected by the system. These inconsistencies generate error messages that appear in bold red text at top of the PSR screen. These inconsistencies must be resolved manually by updating the records or via GDB overriding the inconsistency.

31. **Radio button** – A radio button is similar to a checkbox but often appears in a grid. Only one radio button in a group may be selected at a time (as with a car radio, where only one station can be selected at a time).

32. **Relationship** – A relationship is a link between two entities in SIS. Relationships may be created automatically by the system or manually by the user.

33. **Scroll** – Moving the screen up and down or side-to-side using the bars on the edge of the browser window.

34. **Search Criteria** – Search criteria are the set of values a user enters into a search page, in order to locate a record or set of data. The search engine returns values that correspond to the entered search criteria. More detailed criteria will increase the precision of the returned results.

35. **Security Group** – Collection of users with a given set of permissions, as defined by GDB. These permissions define the access users have to view data and perform actions in SIS. For example, a user at a Case Coordination Center (CCC) will only be able to view patient data for those patients assigned to his/her CCC.

36. **Sort** – Data that appears in a grid may be organized, or sorted in multiple ways. Typically data can be sorted alphabetically or numerically, from lowest to highest, or vice versa. In some cases, SIS allows you to sort based on multiple prioritized criteria. For example, a list of Headline Cases may be sorted first by Accession Number, then by Client Last Name.

37. **Tracking Event** - Tracking events are used to track changes to the status of a case in SIS. This will typically include documentation of actions that have already taken place. For example, “Clinician agreed to PDC referral.” or “Physician result letter sent.”

38. **Tracking Status** – Identifies the current status of the case, based on the Interpretation or on Tracking Events that have been entered on the case.

39. **Validation** – Automatic evaluation of data that has been entered. For example, SIS will validate any address that has been entered, to ensure it is a “valid” address.

40. **Warning** – A warning is an automatic message pop-up, triggered as a result of a user action in SIS. This warning may be used to identify your next step in SIS (e.g. “You have saved changes to interpretation factors. Do you want to send a mailer or enter tracking events?”) In other cases, a warning attempts to help you avoid making a mistake